



# COMMONWEALTH OF INDEPENDENT STATES MEDIA LANDSCAPE

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- ARMENIA
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# **AZERBAIJAN MEDIA LANDSCAPE**

# Country Overview



UPCOMING ECONOMIC AND TOURISM HUB



**CAPITAL**  
**Baku**

**REGION**  
**Eurasia**

**GDP PER CAPITA, PPP**  
**\$18,023**

**GDP**  
**\$46.9 billion**

**POPULATION**  
**9,942,334**

**AREA**  
**86,600 SQ.KM**

Azerbaijan is rich in natural resources, and its economy is heavily based on oil and other energy exports.

The country is considered an upper-middle income nation possessing a high level of economic development and literacy.

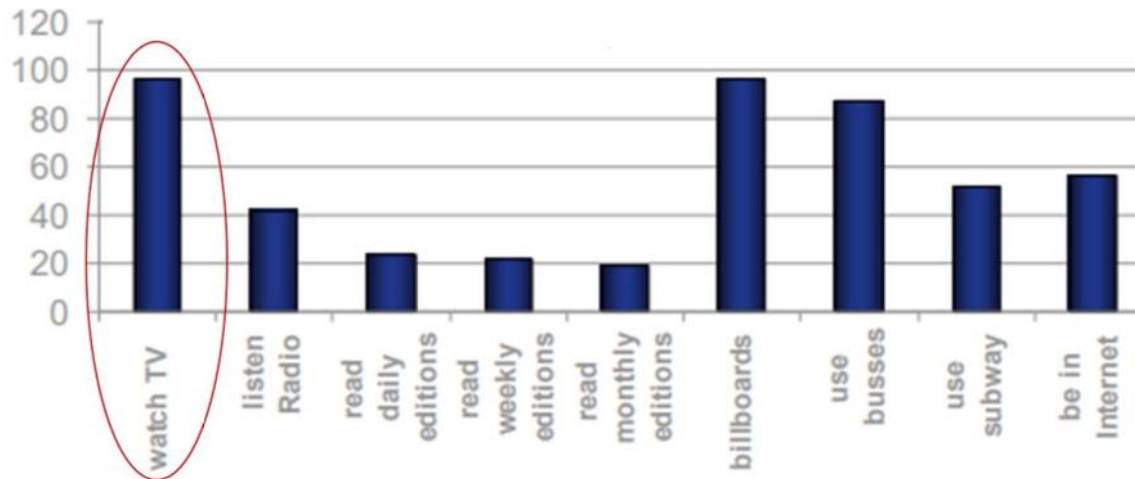
Azerbaijani media is influenced by the political processes in the country and are basically separated in pro-government and pro-opposition media.

# Media Consumption Overview



TRADITIONAL MEDIA STILL HAS THE STRONGEST HOLD IN THE COUNTRY

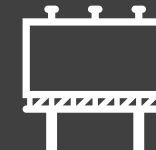
Most popular mediums in Baku, 2017



TV is the most consumed medium in Baku.



Digital adoption is upcoming in the country.



Outdoor maintains a very high reach among urban audiences.

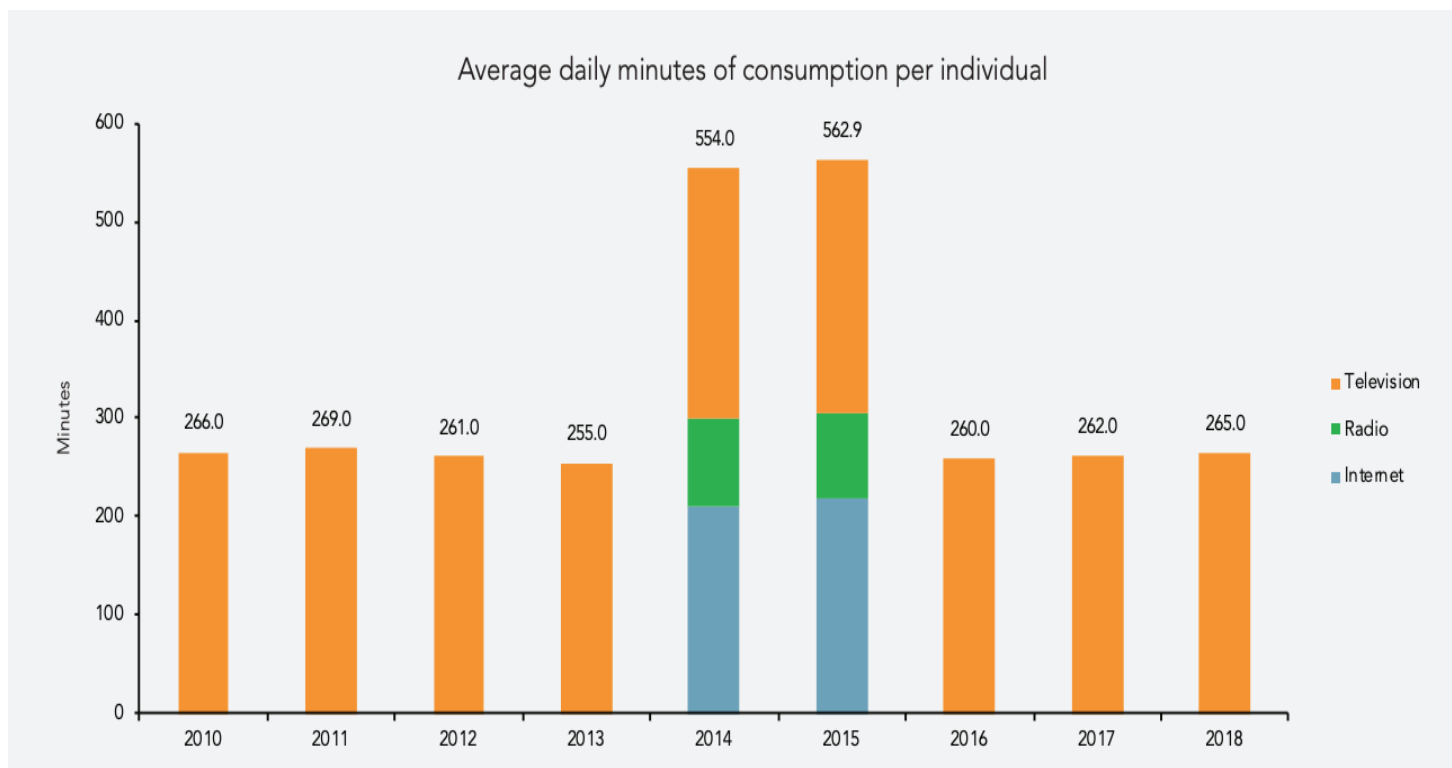


Has the highest penetration across the country- 97%.

# Television



TV IS THE MOST DEMANDED MEDIUM, AND HIGHLY CONSUMED IN URBAN AREAS



On average, 265 minutes of TV are consumed per person per day in Azerbaijan.

TV is the most popular medium and many homes have a satellite connection.

Television content is tightly controlled by the government.

# Television



## LEADING TV NETWORKS IN AZERBAIJAN



AZ TV



ATV Azad Television



ANS Television



Lider Television



Xazar Television

# Radio



A HUB FOR LOCAL CONTENT AS FOREIGN CONTENT IS BARRED



The most popular radio stations in Azerbaijan

As of 2019, there are 13 radio stations in Baku. They are mainly divided into state, private, and public domain.

Content is government controlled. There are no talk shows or debates.

The last known figure of radio's penetration is from 2014, when it was at 97%.



# Print



## PRINT MEDIA IN AZERBAIJAN IS MOSTLY STATE-OWNED OR SUBSIDIZED BY THE GOVERNMENT

### AZER NEWS

**Circulation:** 48,000

**Frequency:** Twice a week (Wed & Friday)

AzerNews is a broad-sheet publication with a print-run as the first English language newspaper. It is in the vanguard of the country's print media market. It covers trends and developments in all major sectors of the Azerbaijani economy, including real estate, telecommunications, construction, finance, banking, tourism, industry, and energy. It is also an online newspaper, which reports about Azerbaijan and the entire Caspian region.



### BAKU

**Circulation:** 15,000

**Frequency:** 6 times a Year

Baku magazine is the print and online magazine about everything edited by Leyla Aliyeva and published by Condé Nast in London. It supports conservation and wildlife charities, and it's also a hub for news, events and features, from around the world.



## **NARGIS**

**Circulation: 5000**

**Frequency: 10 times a year**

Nargis acts as a diverse publication and provides unlimited opportunities for enlightenment in various fields of culture. It is a magazine about fashion, lifestyle, beauty, art, cinema and music, published since 2012 in Azerbaijan. The magazine is read by the affluent women of Azerbaijan.



## **AZERI OBSERVER**

**Circulation: 5000**

**Frequency: Quarterly**

Azeri Observer is Azerbaijan's leading English language magazine founded by AssA-Irada, Azerbaijan's first independent news agency. Each issue includes three exclusive interviews with foreign ambassadors. It is distributed to all 65 embassies in the Azerbaijani capital and more than 500 locations in Baku including executives of state-run and international companies, hotels and business centers.



## **THE MOST**

**Circulation: 5000**

**Frequency: Quarterly**

The MOST is the leading luxury lifestyle publication in Azerbaijan, issued quarterly in Russian with a summary in English. It is not just a print publication, but a real encyclopedia filled with MOST exclusive information designed to entertain, inform and educate an experienced reader. The magazine is distributed among embassies, five-star hotels located in Baku and the regions, beauty salons, business centers, restaurants, as well as through the VIP list of recipients, representatives of the intelligentsia and the elite.



# Out of Home



- OOH Advertising is one of the most effective mediums to reach the Azerbaijan Population.
- Advertisement billboards are now the most persuasive methods and carriers of advertisement information in the country.
- Baku has a strong portfolio of out of home media in prime locations, ensuring a large number of eyeballs.
- The outdoor assets in the city are in various format and strategically located in heavy traffic and pedestrian centers. This also includes transit advertising like the subway.





# Digital



INTERNET PENETRATION STANDS AT 81.1% WITH FEW SOCIAL MEDIA USERS



# Digital



## GOOGLE ATTRACTS MOST TRAFFIC

JAN  
2021

### TOP WEBSITES BY TRAFFIC (ALEXA)

RANKING OF TOP WEBSITES BASED ON TOTAL TRAFFIC VOLUME IN DECEMBER 2020, ACCORDING TO ALEXA\*



AZERBAIJAN

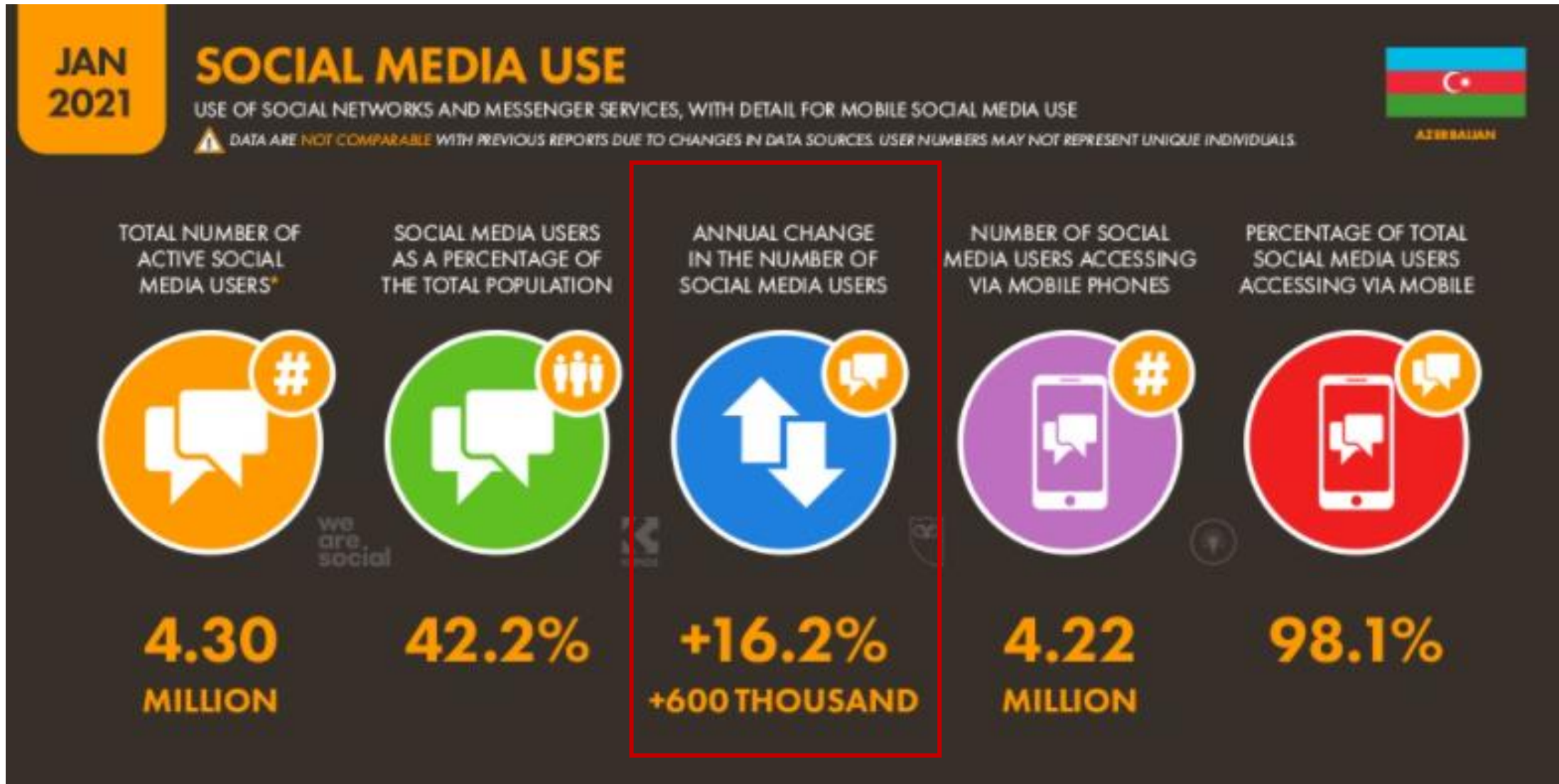
#	WEBSITE	TIME / DAY	PAGES / DAY
01	GOOGLE.COM	15M 41S	1702
02	YOUTUBE.COM	17M 23S	9.86
03	WIKIPEDIA.ORG	3M 48S	3.10
04	MICROSOFT.COM	4M 29S	3.32
05	GOOGLE.AZ	6M 01S	5.91
06	MAIL.RU	3M 33S	2.76
07	YAHOO.COM	5M 08S	4.74
08	ZOOM.US	8M 14S	3.93
09	TAP.AZ	11M 27S	9.39
10	FACEBOOK.COM	18M 47S	8.82

#	WEBSITE	TIME / DAY	PAGES / DAY
11	OXU.AZ	17M 53S	6.75
12	TURBO.AZ	15M 47S	10.80
13	VIRTUAL.EDU.AZ	2M 04S	1.13
14	MICROSOFTONLINE.COM	1M 10S	1.87
15	E-TAXES.GOV.AZ	14M 16S	5.98
16	E-GOV.AZ	10M 33S	5.34
17	MY.GOV.AZ	4M 35S	3.00
18	GOOGLE.RU	3M 50S	4.76
19	TRENDYOL.COM	13M 46S	11.80
20	VK.COM	7M 21S	3.77

# Digital



SOCIAL MEDIA USERS ARE STEADILY INCREASING EVERY YEAR





# Upcoming Opportunities



## LIST OF PUBLIC HOLIDAYS

- New Year's Day Holidays: 1<sup>st</sup> Jan – 4<sup>th</sup> Jan
- Martyrs' Day: 20<sup>th</sup> January
- Women's Day: 8<sup>th</sup> March
- Nowruz/Spring Holidays: 20<sup>th</sup> Mar – 26<sup>th</sup> March
- Victory Day over Fascism: 9<sup>th</sup> March
- Republic Day: 28<sup>th</sup> May
- Day of National Salvation of the Azerbaijani People: 15<sup>th</sup> June
- Azerbaijan Armed Forces Day: 26<sup>th</sup> June
- Feast of the Sacrifice: 20<sup>th</sup> July & 21<sup>st</sup> July
- Victory Day of the Republic of Azerbaijan: 8<sup>th</sup> November
- State Flag Day of Azerbaijan: 9<sup>th</sup> November
- World Azerbaijanis Solidarity Day: 31<sup>st</sup> December





# **ARMENIA**

## **MEDIA LANDSCAPE**



# Country Overview



A CULTURAL HERITAGE THAT ATTRACTS TOURISTS



CAPITAL  
**Yerevan**

REGION  
**Eurasia**

GDP PER CAPITA, PPP  
**\$4,622**

GDP  
**\$12.81  
billion**

POPULATION  
**2,968,262**

AREA  
**29,743 SQ.KM**

Armenia is a landlocked country in Southwestern Asia or Eurasia. It is situated at the gateway between Western Asia and Eastern Europe and bordered by Azerbaijan, Georgia, Iran, and Turkey.

Its rich cultural and architectural heritage combines elements from different traditions. The Armenian language is part of the Indo-European family, but its alphabet is unique.

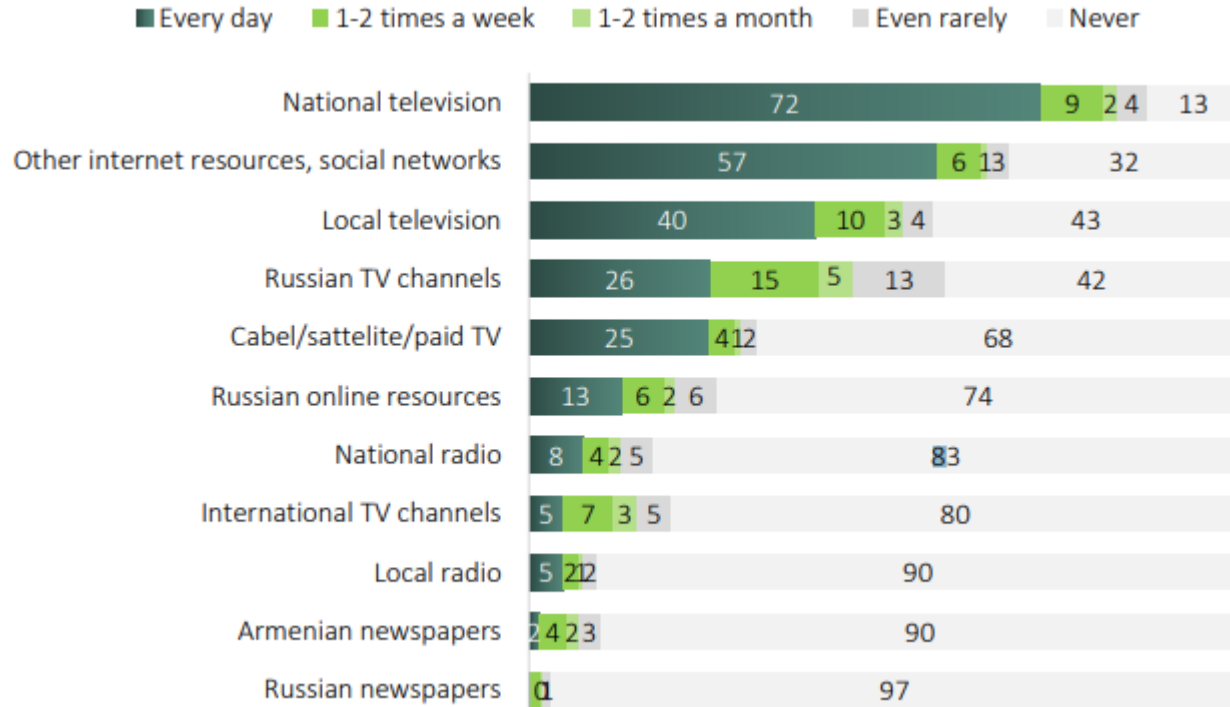
Under Soviet rule the Armenian economy was transformed from agricultural to primarily industrial; agriculture, however, remains important, accounting for about two-fifths of the gross domestic product and employing one-fifth of the labour force.

# Media Consumption Overview



TRADITIONAL MEDIA STILL HAS THE STRONGEST HOLD IN THE COUNTRY

## Consumption of media, 2019 (% of total)



TV is the most consumed medium in Armenia



Online media is rising



Print sector is small and less consumed



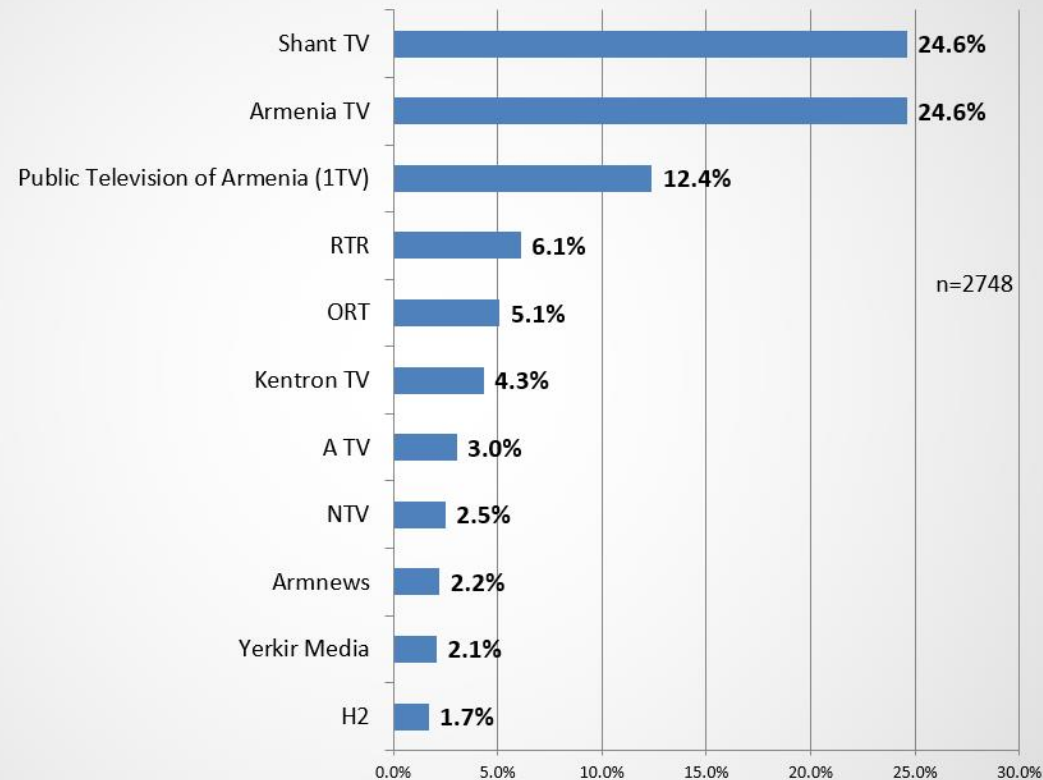
Music content is the most popular

# Television



TV IS THE MOST DEMANDED MEDIA

## Popular TV channels and their preference



APR Group

According to the annual report of the International Telecommunication Union (ITU), 798,000 Armenian owned a TV set (2017)

Television content is operated by both state-owned and for-profit corporations.

TV is the most popular medium and many homes have a satellite connection.

# Radio



## RADIO STATIONS IN ARMENIA BROADCAST IN THE ARMENIAN AND RUSSIAN LANGUAGES

### The most popular radio stations in Armenia



Armenian National Radio is the most popular radio station in the country

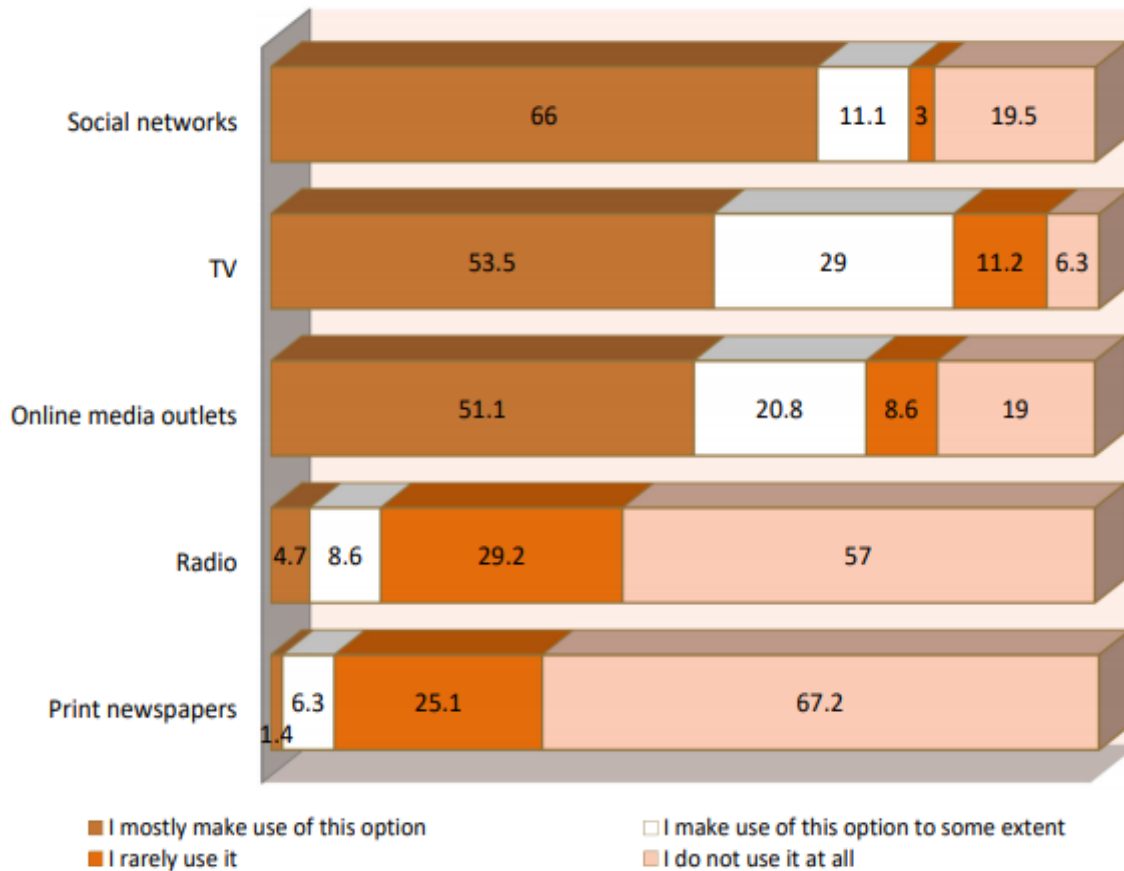
A fifth of Armenian households have a radio and 16 percent have a radio in their car

Music content is by far the most popular, mentioned by 78 percent of the listeners, followed by news, with 51



## NEWS WEBSITE GET MORE PREFERENCE OVER PRINT

What sources of information do you make use of to learn news about events that are important for Armenia (%)



## Four most frequently accessed news websites in Armenia

News website	%	News website	%
2019		2017	
News.am	23%	News.am	32
Azatutyun.am	13%	Shamshyan.com	18
Shamshyan.com	10%	Tert.am	16
Tert.am	9%	Azatutyun.am	11

People access the news websites far more frequently which shows that the country is moving forward towards digital media



## TOP PRINT NEWSPAPERS



### **Armenia Liberty**

Armenian newspaper published in English and Armenian languages.



### **Aravot**

Leading daily newspaper in Armenia. The newspaper published in Armenian, English & Russian languages.



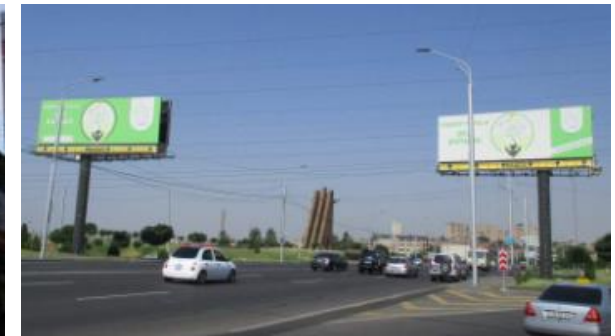
### **Tert**

Leading newspaper published in Russian, and Armenian-language.

# Out of Home



Pikasso is a leading Out-of-Home advertising company owning spaces in and around the airport, city center and malls



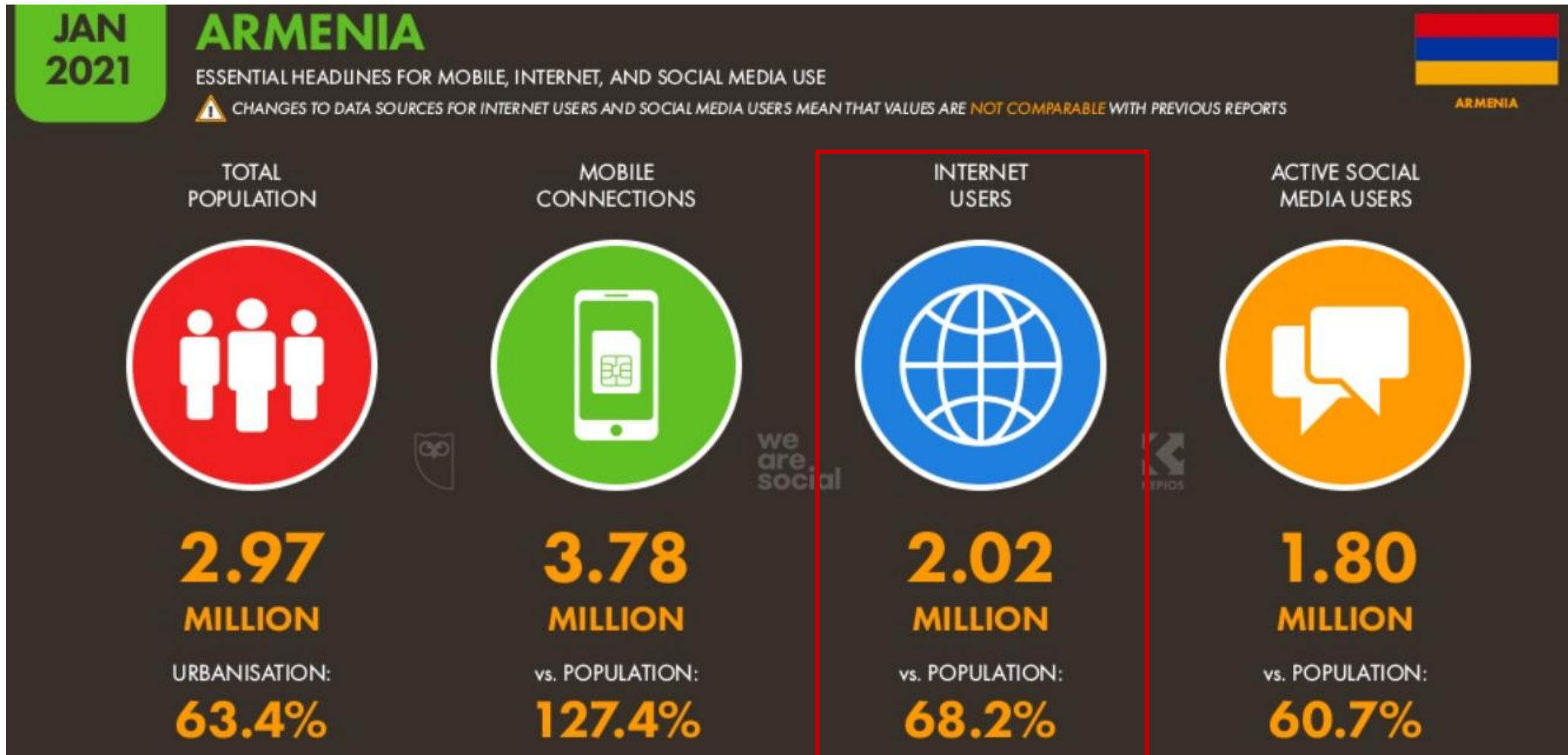
G Design Group is known for innovation and high quality in the development of Out-of-Home media. This includes traditional billboards, poster panels and wallscapes located in Yerevan



# Digital



INTERNET PENETRATION STANDS AT 68.2% WITH A 5.6% INCREASE IN INTERNET USERS SINCE LAST YEAR





# Digital



THEY SPEND THE LONGEST TIMES ON YOUTUBE

JAN  
2021

## TOP WEBSITES BY TRAFFIC (ALEXA)

RANKING OF TOP WEBSITES BASED ON TOTAL TRAFFIC VOLUME IN DECEMBER 2020, ACCORDING TO ALEXA\*



ARMENIA

#	WEBSITE	TIME / DAY	PAGES / DAY
01	GOOGLE.COM	15M 41S	1702
02	YOUTUBE.COM	17M 23S	9.86
03	BONGACAMS.COM	2M 46S	1.59
04	OK.RU	4M 11S	2.36
05	LIST.AM	16M 29S	15.00
06	NEWS.AM	12M 38S	4.29
07	GOOGLE.RU	3M 50S	4.76
08	FACEBOOK.COM	18M 47S	8.82
09	WIKIPEDIA.ORG	3M 48S	3.10
10	MAIL.RU	3M 33S	2.76

#	WEBSITE	TIME / DAY	PAGES / DAY
11	GOOGLE.AM	5M 28S	6.30
12	YANDEX.RU	6M 16S	3.85
13	AMAZON.COM	10M 40S	9.94
14	VK.COM	7M 21S	3.77
15	EMIS.AM	15M 28S	8.31
16	TOTOGAMING.AM	12M 46S	5.20
17	VIVAROBET.AM	8M 18S	3.80
18	MAMUL.AM	7M 49S	3.80
19	FEEDC.COM	3M 03S	1.30
20	ZOOM.US	8M 14S	3.93

we  
are  
social

# Digital



2021 SAW A 20% INCREASE IN SOCIAL MEDIA USERS

JAN  
2021

## SOCIAL MEDIA USE

USE OF SOCIAL NETWORKS AND MESSENGER SERVICES, WITH DETAIL FOR MOBILE SOCIAL MEDIA USE

 DATA ARE **NOT COMPARABLE** WITH PREVIOUS REPORTS DUE TO CHANGES IN DATA SOURCES. USER NUMBERS MAY NOT REPRESENT UNIQUE INDIVIDUALS.



ARMENIA

TOTAL NUMBER OF  
ACTIVE SOCIAL  
MEDIA USERS\*



**1.80**  
MILLION

SOCIAL MEDIA USERS  
AS A PERCENTAGE OF  
THE TOTAL POPULATION



**60.7%**

ANNUAL CHANGE  
IN THE NUMBER OF  
SOCIAL MEDIA USERS



**+20.0%**  
**+300 THOUSAND**

NUMBER OF SOCIAL  
MEDIA USERS ACCESSING  
VIA MOBILE PHONES



**1.76**  
MILLION

PERCENTAGE OF TOTAL  
SOCIAL MEDIA USERS  
ACCESSING VIA MOBILE



**97.5%**

# Upcoming Opportunities



## LIST OF PUBLIC HOLIDAYS

- New Year's Day Holidays: 1<sup>st</sup> January – 4<sup>th</sup> January
- Christmas Holiday: 5<sup>th</sup> January and 7<sup>th</sup> January
- Army Day: 28<sup>th</sup> January
- Women's Day: 8<sup>th</sup> March
- Genocide Remembrance Day: 24<sup>th</sup> April
- Citizen's Day: 25<sup>th</sup> April
- Labour Day: 1<sup>st</sup> May
- Republic Day: 28<sup>th</sup> May
- Constitution Day: 5<sup>th</sup> July
- Independence Day: 21<sup>st</sup> September
- New Year's Eve: 31<sup>st</sup> December

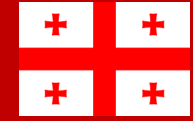




# **GEORGIA**

## **MEDIA LANDSCAPE**

# Country Overview



ECONOMIC GROWTH HAS BEEN SOLID



CAPITAL  
**Tbilisi**

GDP  
**\$17.48  
Billion**

REGION  
**Eurasia**

POPULATION  
**3,982,200**

GDP PER CAPITA, PPP  
**\$4,697**

AREA  
**69,700 SQ. KM**

Destination Georgia, the south Caucasian country bordering the Black Sea in west. The country is located at the crossroads between Western Asia and Eastern Europe. It shares borders with Armenia, Azerbaijan, Russia, and Turkey.

Economic growth has been solid - averaging 5 percent per annum between 2005 and 2019

The Georgian language is a member of the Kartvelian (South Caucasian) family of languages. It has its own alphabet, which is thought to have evolved about the 5th century, and there are many dialects. Several other Caucasian languages are spoken by minority groups

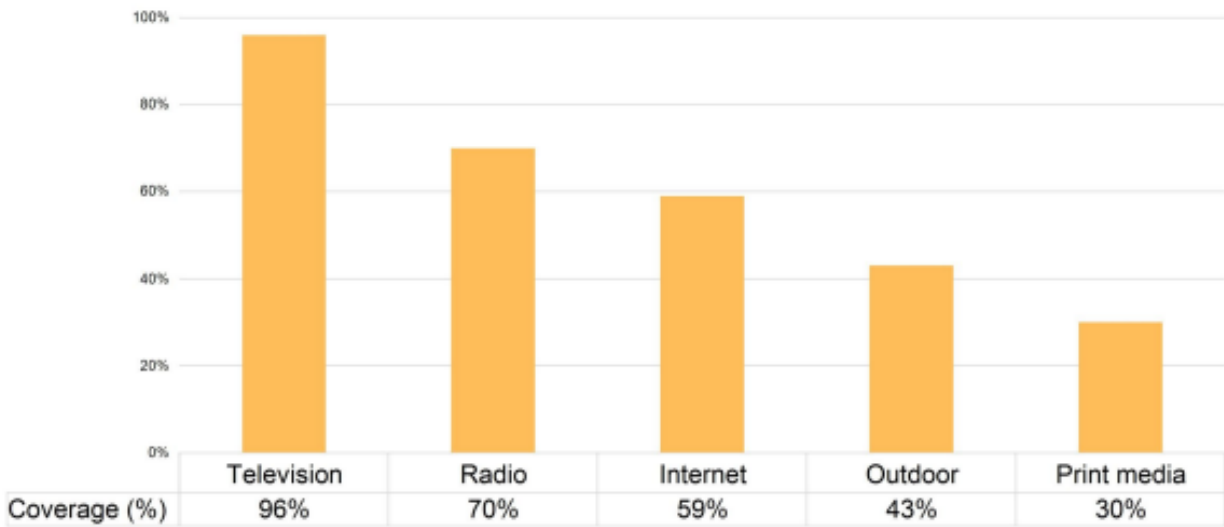


# Media Consumption Overview



THE MEDIA ENVIRONMENT REMAINS THE FREEST AND MOST DIVERSE IN THE SOUTH CAUCASUS

Media distribution/coverage (% of total population), Georgia, Jan-May 2018



Source: ZenithOptimedia, 2018



A large percentage of Georgian households have a television



Rate of internet usage is steadily increasing

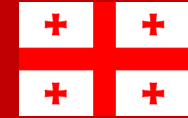


The press carries a broad range of viewpoints

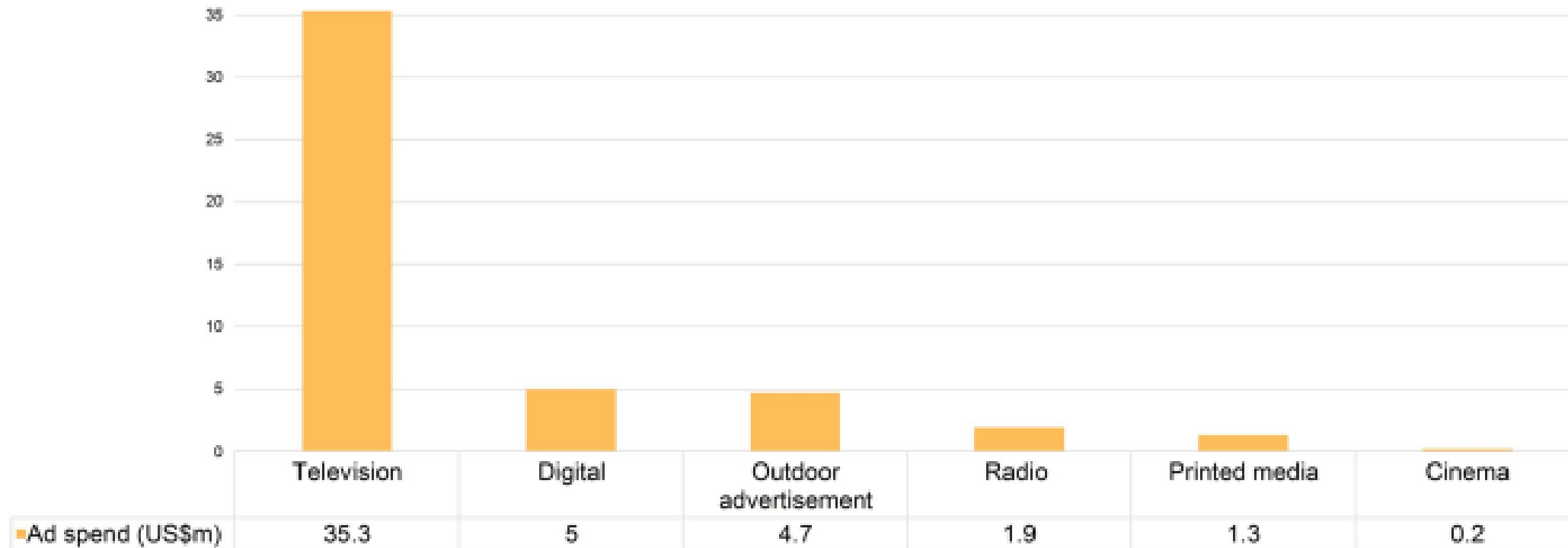


Radio is largely used to receive information

# Media Consumption Overview

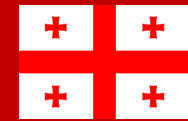


TOTAL AD SPEND (US\$M), BREAKDOWN BY MEDIA SEGMENT, 2018



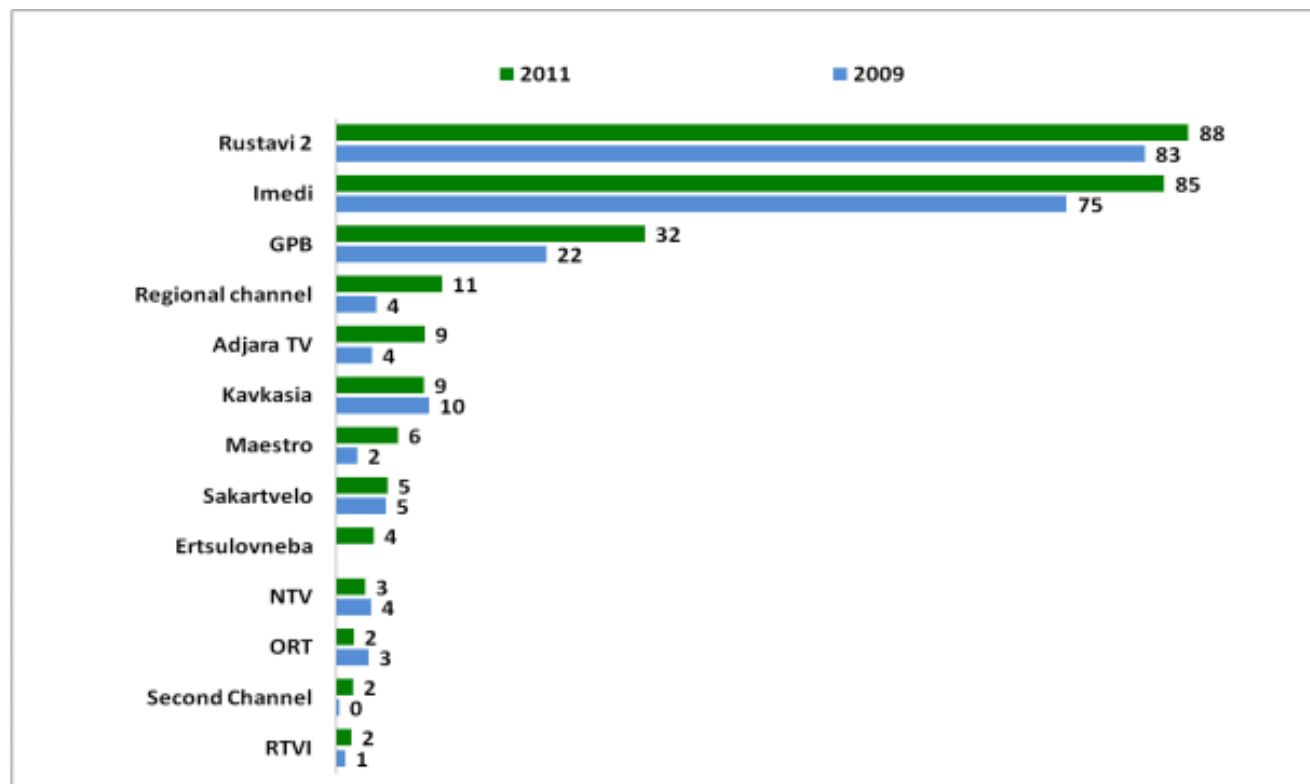
Source: ZenithOptimedia

# Television



## GEORGIANS WATCH TV MAINLY TO RECEIVE INFORMATION

### Top TV channels as a source of news



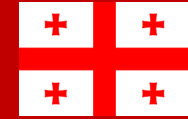
72% of Georgians consumed televised content in 2019

TV is the most consumed medium

Rustavi 2 and Imedi are the most trusted TV channels attracting two-thirds of audience



# Radio



HIGH REACH, HIGH TARGET ABILITY AND LOWER COST IS MAIN REASON WHY RADIO IS POPULAR

## The most popular radio stations in Georgia



Fortuna



Radio Imedi



Abkhazetis Khma

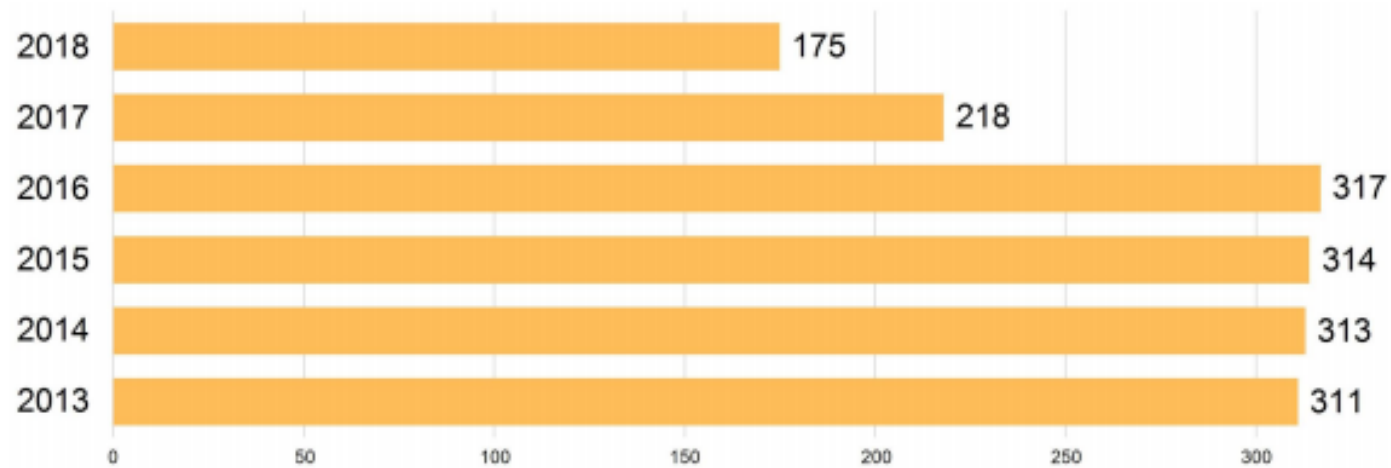
58% of the people listened to radio for at least 15 minutes a day

82% of listeners reported that they listened to radio while driving, during morning

At regional level, radio has become a more community-focused enterprise percent

## NEWS WEBSITES EXPERIENCES A GROWTH IN VISITORS

**Print media in Georgia: Number of newspapers**



Source: GeoSTAT

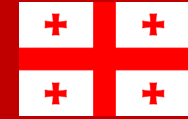
There is no government regulator of print media.

A total of 60.4M newspapers and 27.4M magazines were printed in the country as per the last recorded data (2016)

Newspapers have moved to online from print where the ad spending is growing

The largest among the well-established publishers, by reach, is Palitra Holding, publisher of Kviris Palitra, Georgia's best-selling non-tabloid weekly

# Print



## TOP NEWSPAPER BRANDS



### **Georgia today**

Leading weekly English-language newspaper published in Georgia.



### **Georgian Times**

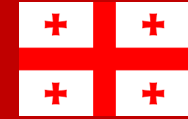
Leading English language newspaper based in Georgia.

## **Georgian Journal**

### **Georgian Journal**

Weekly broadsheet format newspaper based in Tbilisi, Georgia and published by Kviris Palitra Publishers.

# Out of Home



APPROXIMATELY 94% OF OOH MARKET IS DIVIDED



Alma is a leading company in outdoor advertising market in Georgia since 1995.



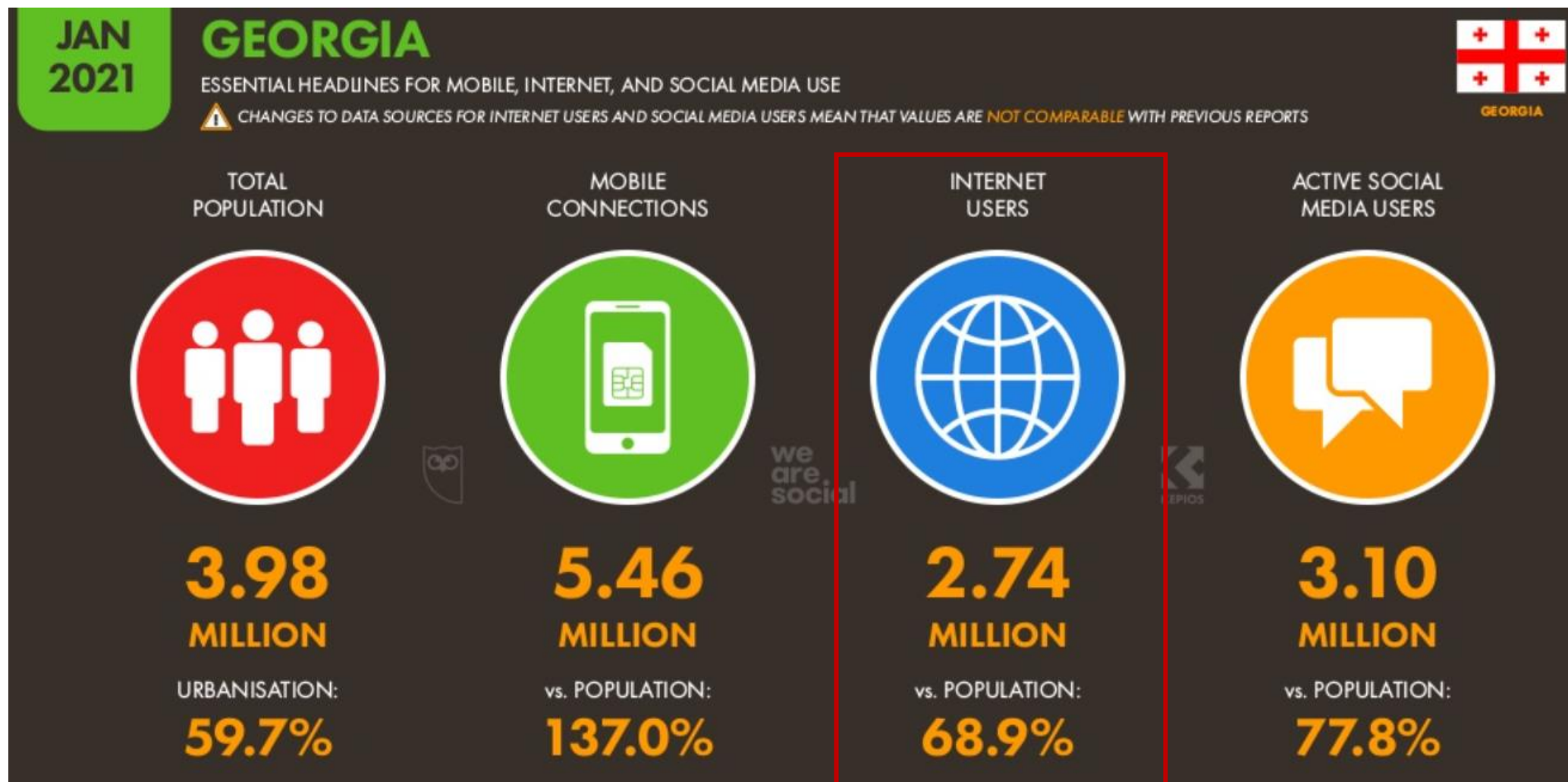
Outdoor.ge was established in 2008 and in a short time has taken a leading position in the Georgian outdoor advertising market.



# Digital



INTERNET PENETRATION STANDS AT 68.9% WITH A 9.5% INCREASE IN INTERNET USERS SINCE LAST YEAR



# Digital



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06	FACEBOOK.COM	18M 47S	8.82
07	WIKIPEDIA.ORG	3M 48S	3.10
08	GOOGLE.GE	4M 03S	5.90
09	YAHOO.COM	5M 08S	4.74
10	OK.RU	4M 11S	2.36

#	WEBSITE	TIME / DAY	PAGES / DAY
11	MYAUTO.GE	20M 02S	13.00
12	MYMARKET.GE	11M 21S	8.70
13	MICROSOFT.COM	4M 29S	3.32
14	ADJARABET.COM	9M 09S	2.90
15	FEEDC.COM	3M 03S	1.30
16	AMAZON.COM	10M 40S	9.94
17	TBCONLINE.GE	5M 21S	3.70
18	FLASHSCORE.COM	14M 07S	11.50
19	IMOVIES.CC	3M 17S	2.90
20	ROBLOX.COM	16M 52S	8.83

we  
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social



# Digital



2021 SAW A 14.8% INCREASE IN SOCIAL MEDIA USERS

JAN  
2021

## SOCIAL MEDIA USE

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GEORGIA

TOTAL NUMBER OF  
ACTIVE SOCIAL  
MEDIA USERS\*



**3.10**  
MILLION

SOCIAL MEDIA USERS  
AS A PERCENTAGE OF  
THE TOTAL POPULATION



**77.8%**

ANNUAL CHANGE  
IN THE NUMBER OF  
SOCIAL MEDIA USERS



**+14.8%**  
**+400 THOUSAND**

NUMBER OF SOCIAL  
MEDIA USERS ACCESSING  
VIA MOBILE PHONES



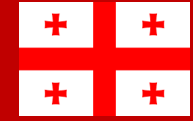
**2.98**  
MILLION

PERCENTAGE OF TOTAL  
SOCIAL MEDIA USERS  
ACCESSING VIA MOBILE



**96.0%**

# Upcoming Opportunities



## LIST OF PUBLIC HOLIDAYS

- New Year's Day Holidays: 1<sup>st</sup> January – 2<sup>nd</sup> January
- Christmas Holiday: 7<sup>th</sup> January
- Mothers' Day: 3<sup>rd</sup> March
- Women's Day: 8<sup>th</sup> March
- Independence Restoration Day: 9<sup>th</sup> April
- Easter Holidays: 30<sup>th</sup> April (Good Friday) – 3<sup>rd</sup> May
- Nationwide Public Holiday: 4<sup>th</sup> May – 11<sup>th</sup> May
- St Andrew's Day: 12<sup>th</sup> May
- Independence Day: 26<sup>th</sup> May
- Day of the Assumption of Mary: 28<sup>th</sup> August
- Svetitskhovloba – 14<sup>th</sup> October
- St George's Day – 23<sup>rd</sup> November







# **KAZAKHSTAN MEDIA LANDSCAPE**

# Country Overview



WORLD'S LARGEST LANDLOCKED COUNTRY AND CENTRAL ASIA'S LARGEST ECONOMY

## Overview of Kazakhstan



**CAPITAL**  
**Astana**

**REGION**  
**Asia**

**GDP PER CAPITA, PPP**  
**\$27,660**

**GDP**  
**\$170.5 billion**

**POPULATION**  
**18,276,499**

**AREA**  
**2,724,900 SQ.KM**

Kazakhstan is the 61st most populous country in the world because of its large land area, its population density is amongst the lowest.

Much of the growth in the country's economy has been tied to the oil sector. From the mid-1990s to 2010, its per capita gross domestic product is estimated to have increased more than tenfold.

Kazakhstan has an ethnically diverse population, with Kazakhs making up more than 60 percent of the population and Russians constituting about a quarter.

# Tourism Overview



HOTEL SEARCHES TO THE UAE RANK AS THE MOST POPULAR CHOICE FOR KAZAKH TRAVELERS

## Kazakhstan

	Origin Country ① ▲	Destination Country	Percentage of Events ② ▼
1.	Kazakhstan	United Arab Emirates	31.01%
2.	Kazakhstan	Kazakhstan	30.83%
3.	Kazakhstan	Maldives	17.39%
4.	Kazakhstan	Turkey	7.86%
5.	Kazakhstan	Russia	4.47%

Inbound Travel Intent (February 2021)

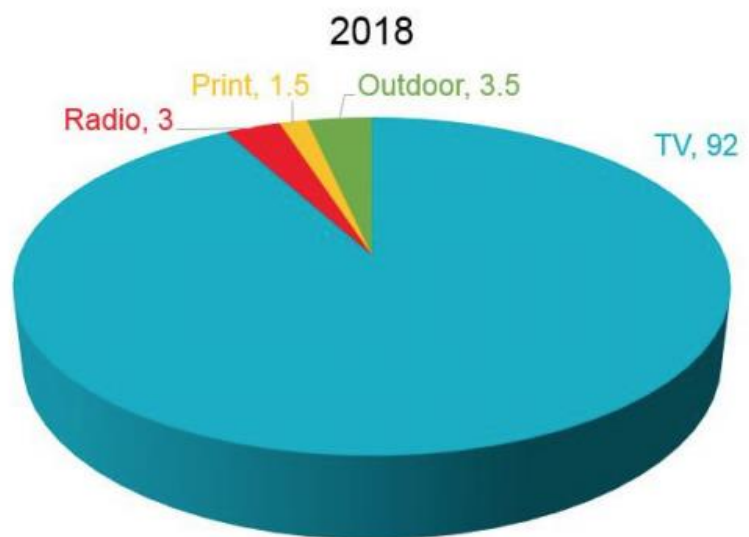
Source: [Sojern](#)

# Media Consumption Overview



TV IS FAR AHEAD OF ANY OTHER MEDIUM

Share of ad spend, %, by medium in Kazakhstan



Source: Kantar TNS, 2018



TV has the widest reach in the country



Radio has a small but stable audience



Declining readership



Digital takes up 32% of total time spent with media

# Television



## KAZAKHSTAN IS A TELEVISION NATION

*Most popular TV stations in Kazakhstan by 2018 rating (%), 2014-2018*

	2014	2015	2016	2017	2018	Majority owner
Eurasia	85.6	83.4	82.5	74.9	71.2	Government
KTK	71.2	73.3	73.8	71.8	68.5	The First President
NTK	72.7	74.2	70.5	65.7	65.2	The family of the First President
Channel 31	75.9	72.2	72.1	69.2	64.9	Utemuratov Bulat
Mir	44.6	48.5	54.6	54.8	60.9	International channel
Channel Seven	69.0	69.9	66.4	63.9	60.5	Rakishev Kenes
Astana TV	59.5	60.5	55.5	59.4	56.4	Government
Khabar	68.8	69.1	64.8	61.7	51.7	Government
Almaty TV	23.32	23.18	30.18	35.15	43.8	Government
Qazaqstan	53.3	57.8	58.9	49.2	43.7	Government

Sources: TNS Global Kazakhstan, Egov.kz, 2019

76% of the population in Kazakhstan watch TV at least once a day.

TV viewers spend roughly 200 minutes.

Television is an uncontested leader in advertising market. By 2018, it commanded 92% of the total ad revenues.

# Radio



36% OF THE POPULATION LISTENS TO RADIO

*Most popular radio channels in Kazakhstan by 2018 rating (%), 2014-2018*

	2014	2015	2016	2017	2018	Majority owner
Radio Retro	52.8	47.4	51.8	42.7	34.8	The family of the First President
Autoradio	45.6	44.9	49.1	43.6	33.0	Kantarbayev Askar
Russian Radio	45.9	43.0	43.9	41.8	33.0	DLS Group (Kazakhstan)/ Russian Telegraph (Russia)
Radio Dacha	n/a	n/a	n/a	n/a	32.9	Mustafina Tolkyn (Kazakhstan)/ Radio Dacha (Russia)
Radio NS	37.1	29.5	34.4	26.2	31.3	The Government
Love Radio	24.5	23.7	26.9	30.4	24.5	Kaldybayeva Akmaral
Zhuldyz FM	n/a	18.5	29.6	25.6	21.3	Kazybayev Batyr, Temirova Dinara
Dala FM	n/a	n/a	23.1	25.9	19.5	Kantarbayev Askar
Kazakh Radio	21.8	14.3	14.9	17.6	14.9	The Government
Tengri FM	18.4	12.9	12.1	10.8	10.9	Kazybayev Batyr, Temirova Dinara

n/a: not available

Sources: TNS Global Kazakhstan, Egov.kz, 2019

There are only 61 radio stations in the country. In contrast, Kazakhstan has 108 television stations and 1,169 newspapers.

Radio's audience in the country is small but stable, indicating loyalty and trust.

Those who turn on the radio spend about 2 hours listening to it. It accounts for 15% of all time spent with media.



# Print



10% OF THE POPULATION READ PRINTED MEDIA.

*The most popular newspapers in Kazakhstan, May 2019*

Newspaper	Majority owner
Karavan	The First President
KazPravda	Government
Egemen Kazakhstan	Government
Vremya	Subharberdin Nurzhan, LLP Shanyrak Trade
Argumenty i Fakty	Turebayeva Bibigul
Express - K	Shahnovich Igor, Bekkulova Sholpan, LLP Vostok Impax
Zhas Alash	Atusheva Saltanat, Sarsenbay Ana
Liter	Government
Kapital	Mustafina Svetlana, Mustafin Sanzhar
Kursiv	User Saken

Readership has fallen by 5% over the last 3 years.

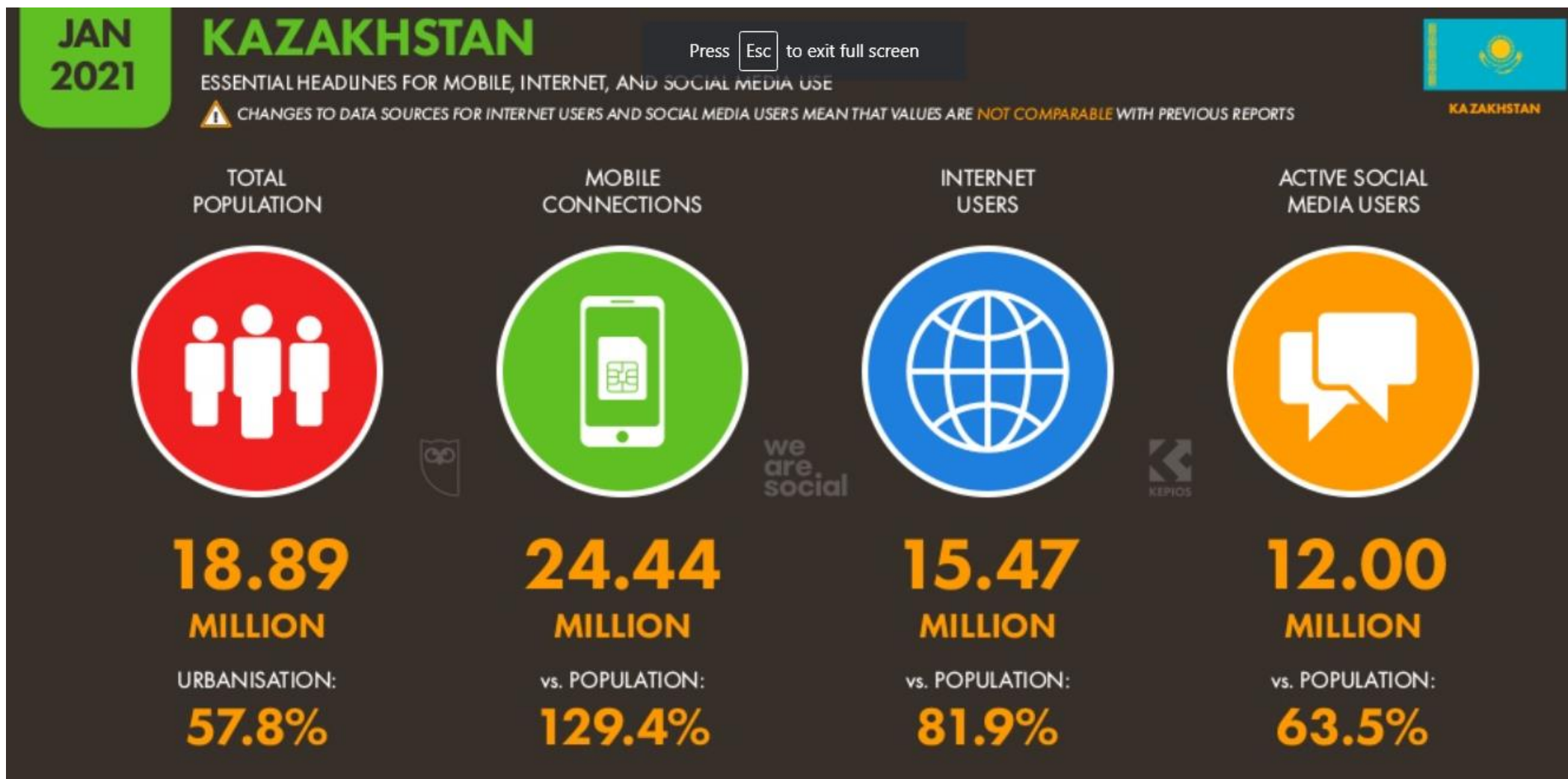
Time spent with the medium is also declining.

Source: CMDS survey, Almaty

# Digital



ALMOST 15 MILLION PEOPLE ARE ONLINE



## YOUTUBE IS THE MOST WATCHED WEBSITE

JAN  
2021

### TOP WEBSITES BY TRAFFIC (ALEXA)

RANKING OF TOP WEBSITES BASED ON TOTAL TRAFFIC VOLUME IN DECEMBER 2020, ACCORDING TO ALEXA\*



KAZAKHSTAN

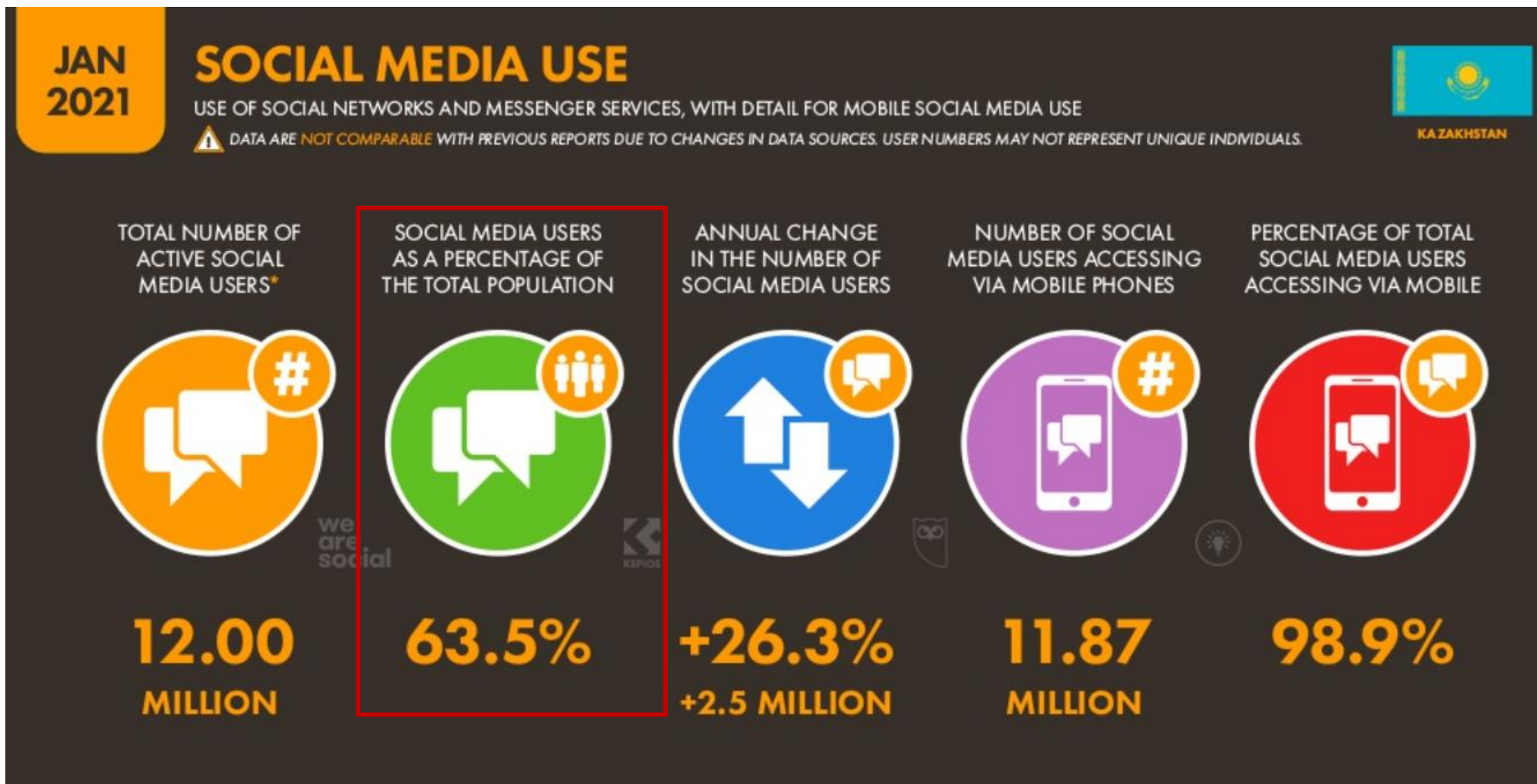
#	WEBSITE	TIME / DAY	PAGES / DAY
01	GOOGLE.COM	15M 41S	1702
02	YOUTUBE.COM	17M 23S	9.86
03	KUNDELIK.KZ	7M 03S	12.00
04	MAIL.RU	3M 33S	2.76
05	VK.COM	7M 21S	3.77
06	NUR.KZ	4M 34S	2.07
07	ONLINEMEKTEP.ORG	5M 11S	2.68
08	GOOGLE.KZ	4M 58S	4.68
09	YANDEX.KZ	2M 45S	1.51
10	WIKIPEDIA.ORG	3M 48S	3.10

#	WEBSITE	TIME / DAY	PAGES / DAY
11	OK.RU	4M 11S	2.36
12	EGOV.KZ	12M 22S	6.99
13	GOOGLE.RU	3M 50S	4.76
14	OLX.KZ	12M 49S	8.07
15	ZOOM.US	8M 14S	3.93
16	ZNANIJA.COM	4M 35S	2.50
17	REZKA.AG	2M 33S	3.17
18	KOLESA.KZ	16M 07S	10.80
19	YANDEX.RU	6M 16S	3.85
20	IVI.RU	2M 53S	2.64

# Digital



MORE THAN HALF THE POPULATION IS ACTIVE ON SOCIAL MEDIA





# Upcoming Opportunities



## LIST OF PUBLIC HOLIDAYS

- New Year's Day Holidays: 1st January – 4th January
- Christmas Holiday: 7th January
- Women's Day: 8th March
- Nauryz Day: 21<sup>st</sup> March – 24<sup>th</sup> March
- Unity Day: 1<sup>st</sup> May – 3<sup>rd</sup> May
- Defender of the Fatherland Day: 7<sup>th</sup> May
- Victory Day: 9<sup>th</sup> May
- Day of the Capital: 6<sup>th</sup> July
- Kurban Ait: 20<sup>th</sup> July
- Constitution Day: 30<sup>th</sup> August
- First President of the Republic of Kazakhstan Day: 1<sup>st</sup> December
- Independence Day: 16<sup>th</sup> December & 17<sup>th</sup> December
- Day of the Assumption of Mary: 28th August



## KEY MEDIA – TV CHANNELS

### EURASIA

**Rating: 71.2%**

Channel One Eurasia is a local Kazakh television station that has been in operation since October 1997. It is one of many privately owned television stations in Kazakhstan closely monitored for any bad press about the Kazakh government.



### KTK

**Rating: 68.5%**

KTK which expands to Kommerceskiyi Televizioniyi Kanal is a Kazakh language channel. KTK is one of the first private television stations in Kazakhstan, having the status of a national broadcaster, a recognized leader in the country's television market over the past 15 years.



### NTK

**Rating: 65.2%**

The first national infotainment channel broadcasting for 21 hours daily in all cities and major regional centers of the Republic of Kazakhstan.





## KEY MEDIA – TV CHANNELS

### CHANNEL 31

**Rating: 64.9%**

---

Channel 31 is a Kazakh nationwide broadcast television station that is based in Almaty, Kazakhstan and are owned and operated by CTC Media and National Media Group. Channel 31 consists of news and thematic programs in both Russian and Kazakh, as well as movies, series, talk shows, and children's, cultural, historical and entertainment programs.

### MIR

**Rating: 60.9%**

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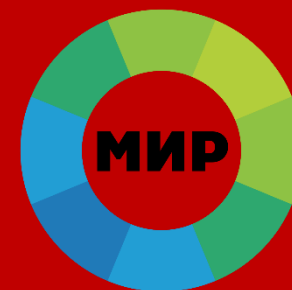
The Mir TV channel introduces viewers to the modern life and history of the countries of the former Soviet Union, and forms cultural, social and economic ties.

### CHANNEL SEVEN

**Rating: 60.5%**

---

Moscow 24 is a Russian 24-hour TV channel, a part of the "Moscow Media" Incorporated editorial office of Moscow media sources and referred to All-Russia State Television and Radio Broadcasting Company (VGTRK). The Channel is headquartered in Moscow City with its production facilities and operations, and is available in Moscow, Moscow Region and Crimea.





# **UZBEKISTAN MEDIA LANDSCAPE**

# Country Overview



NEW TO THE BEST COUNTRIES RANKINGS FOR 2021, UZBEKISTAN RANKED NO. 73 OUT OF 78 COUNTRIES



CAPITAL

**Tashkent**

REGION

**Asia**

GDP PER CAPITA, PPP

**\$7,308**

GDP

**\$57.9 billion**

POPULATION

**33,580,650**

AREA

**447,400 SQ.KM**

Uzbekistan is the geographic center of Central Asia, sandwiched between five countries and featuring a mostly desert climate.

Uzbek is the country's official language, spoken by nearly three-quarters of its population, but about 14% also speak Russian.

Uzbekistan's agriculture industry – the backbone of its economy – remains largely centered on cotton. It is the world's fifth-largest exporter of and seventh-largest producer of cotton.

# Media Consumption Overview



A FREER MEDIA UNDER THE NEW REGIME

## Media Consumption in Uzbekistan



Watch TV

97,3%



Read the paper

55%

50,2%



Listen to radio

57,7%



Use Internet



People of all ages  
prefer TV



Internet consumers more  
situated in the cities but  
rapid growth is seen



Print sector is small and less  
consumed



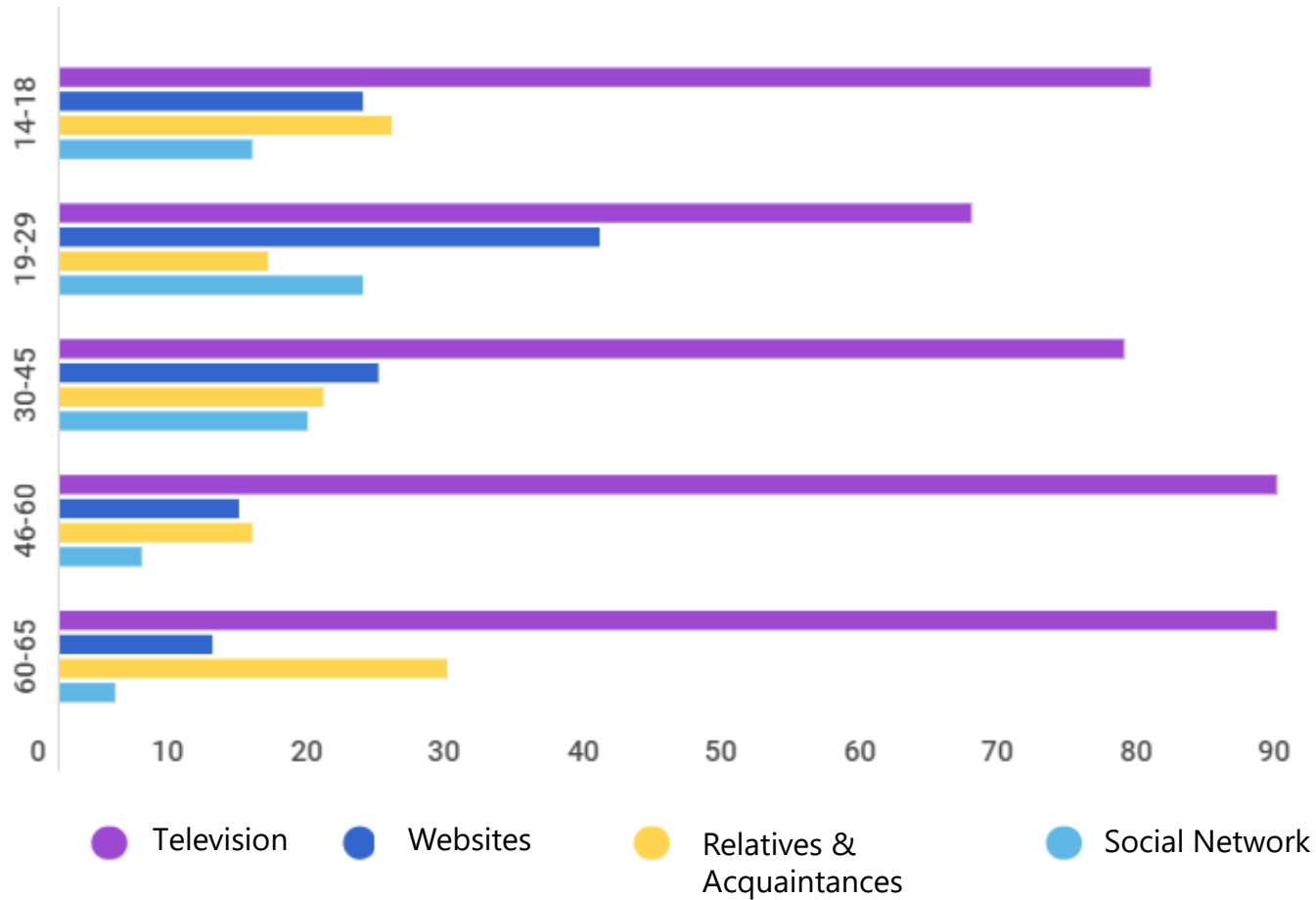
Radio is the least  
consumed media

# Television



## TV IS THE MOST DEMANDED MEDIUM

Source for retrieving information, based on age groups



State-controlled TV channels are still old-fashioned, very cautious in their criticism and avoid any 'conflict topics'

77 per cent of people between the ages of 30 and 45 got their news from TV.

TV is the most popular medium and has the widest coverage

# Radio



## RADIO STATIONS IN UZBEKISTAN BROADCAST IN UZBEK AND RUSSIAN LANGUAGES

### The most popular radio stations in Armenia



Radio Uzbegim Taronasi is a popular radio station of Uzbekistan. This radio broadcasts various types of programs around the clock. Mostly Adult Contemporary music is in playlist.



Navroz FM is one of the popular radio station live broadcasting from Tashkent, Uzbekistan. This radio is very popular and listeners can enjoy local and international music and talk programs 24 hours live online.

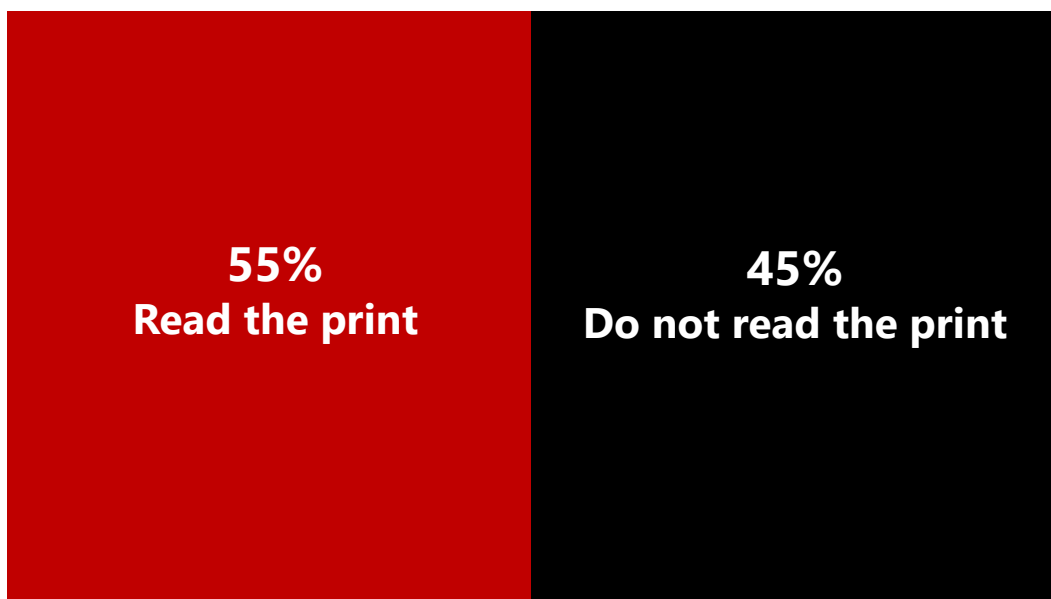


Oriat FM's main emphasis is on the music content, but with high-quality information blocks and a variety of programs.



## OLDER UZBEKS MAKE THE AUDIENCE FOR PRINT

### Print press in Uzbekistan



Active readers of the print are those who are over 60

Electronic versions of newspapers and magazines are more read by those who are between 30 and 45.

### Top print newspapers

**Khalq Sozi** -(People's Word) is a state-run Uzbek language newspaper published from Uzbekistan.

**Narodnoye Slovo** is a Russian language newspaper published from Uzbekistan

**Novosti Uzbekistana** (News of Uzbekistan in English)[1] is a Russian-language newspaper published in Uzbekistan.

# Out of Home



In the matter of effectiveness OOH advertising in Uzbekistan contends with the TV.

It is significant that media inflation in OOH ad segment is not notable for a sudden change and is around 5% since last years. This shows a stable development in a segment



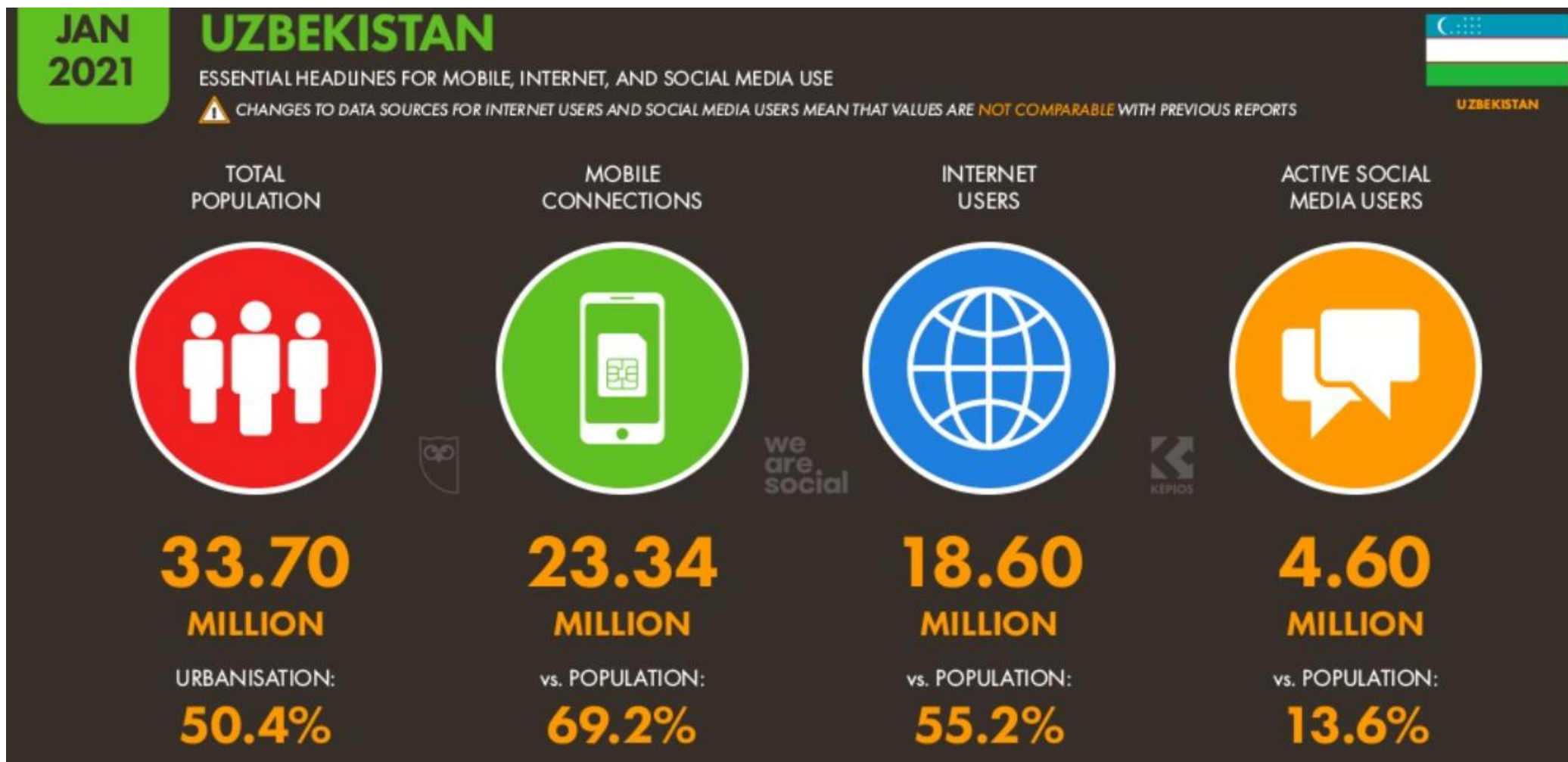
RMAA Group – Russian full-service advertising agency offers effective advertising support of foreign brands, developing promising markets of the CIS countries.



# Digital



ONLINE MEDIA IS UNCENSORED AND LIBERAL



# Digital



THEY SPEND THE LONGEST TIMES ON YOUTUBE

JAN  
2021

## TOP WEBSITES BY TRAFFIC (ALEXA)

RANKING OF TOP WEBSITES BASED ON TOTAL TRAFFIC VOLUME IN DECEMBER 2020, ACCORDING TO ALEXA\*



UZBEKISTAN

#	WEBSITE	TIME / DAY	PAGES / DAY
01	GOOGLE.COM	15M 41S	1702
02	YOUTUBE.COM	17M 23S	9.86
03	OLX.UZ	13M 47S	10.50
04	SOLIQ.UZ	17M 46S	7.53
05	MAIL.RU	3M 33S	2.76
06	WIKIPEDIA.ORG	3M 48S	3.10
07	OK.RU	4M 11S	2.36
08	KUN.UZ	5M 00S	2.92
09	KUNDALIK.COM	22M 45S	7.53
10	GOOGLE.RU	3M 50S	4.76

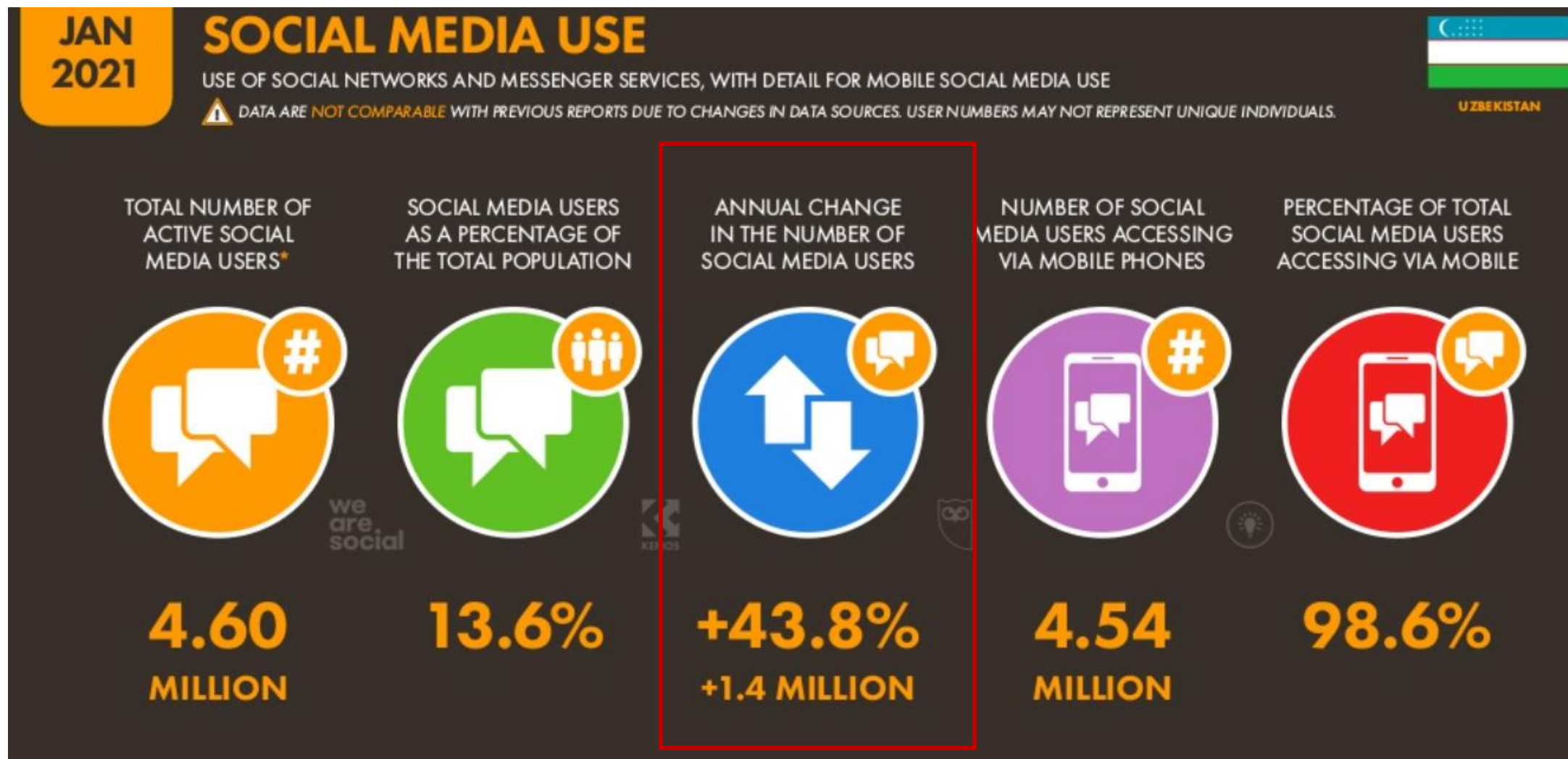
#	WEBSITE	TIME / DAY	PAGES / DAY
11	VK.COM	7M 21S	3.77
12	YANDEX.RU	6M 16S	3.85
13	ESI.UZ	2M 26S	1.20
14	SOLIQSERVIS.UZ	20M 58S	12.00
15	YANDEX.UZ	3M 57S	1.70
16	LEX.UZ	7M 38S	4.00
17	GOV.UZ	23M 26S	4.80
18	DARYO.UZ	9M 04S	4.39
19	UZEX.UZ	21M 09S	15.00
20	MOVER.UZ	6M 43S	4.60



# Digital



2021 SAW A 43.8% INCREASE IN SOCIAL MEDIA USERS



# Upcoming Opportunities



## LIST OF PUBLIC HOLIDAYS

New Year's Day Holidays: 1st January – 2nd January

Defenders of the Motherland Day: 14th January

Women's Day: 8th March

Nowruz Holiday: 20<sup>th</sup> March – 22<sup>nd</sup> March

Remembrance Day: 9<sup>th</sup> May

Eid al-Fitr: 3 Day holiday depending on Lunar Calendar

Eid al-Adha: 20th July (Depending on Lunar Calendar)

Independence Day: 1<sup>st</sup> September – 4<sup>th</sup> September

Teachers Day: 1st October

Constitution Day: 8th December







# **UKRAINE MEDIA LANDSCAPE**

# Country overview



SECOND LARGEST COUNTRY IN EUROPE AFTER RUSSIA BY LAND (2021)

## Overview of Ukraine



CAPITAL  
**Kyiv**

REGION  
**Europe**

GDP PER CAPITA, PPP  
**\$13,341**

GDP  
**\$154 billion**

POPULATION  
**44,385,155**

AREA  
**603,550 SQ.KM**

Ukraine and Russia share common historical origins, the west of the country has closer ties with its European neighbours, particularly Poland, and nationalist sentiment is strongest there.

Culturally, Ukraine is influenced by Western and Central Europe, Russia to the east and by religion - the predominant faith in the country is Eastern Orthodoxy..

Services, industry and agriculture are Ukraine's three largest economic sectors.

# Tourism overview



HOTEL SEARCHES TO THE UAE RANK AS THE MOST POPULAR CHOICE FOR UKRAINIANS

## Ukraine

	Origin Country ⓘ ▲	Destination Country	Percentage of Events ⓘ ▼
1.	Ukraine	United Arab Emirates	21.66%
2.	Ukraine	Maldives	20.21%
3.	Ukraine	Ukraine	11.82%
4.	Ukraine	Turkey	8.92%
5.	Ukraine	Russia	7.09%

Inbound Travel Intent (February 2021)

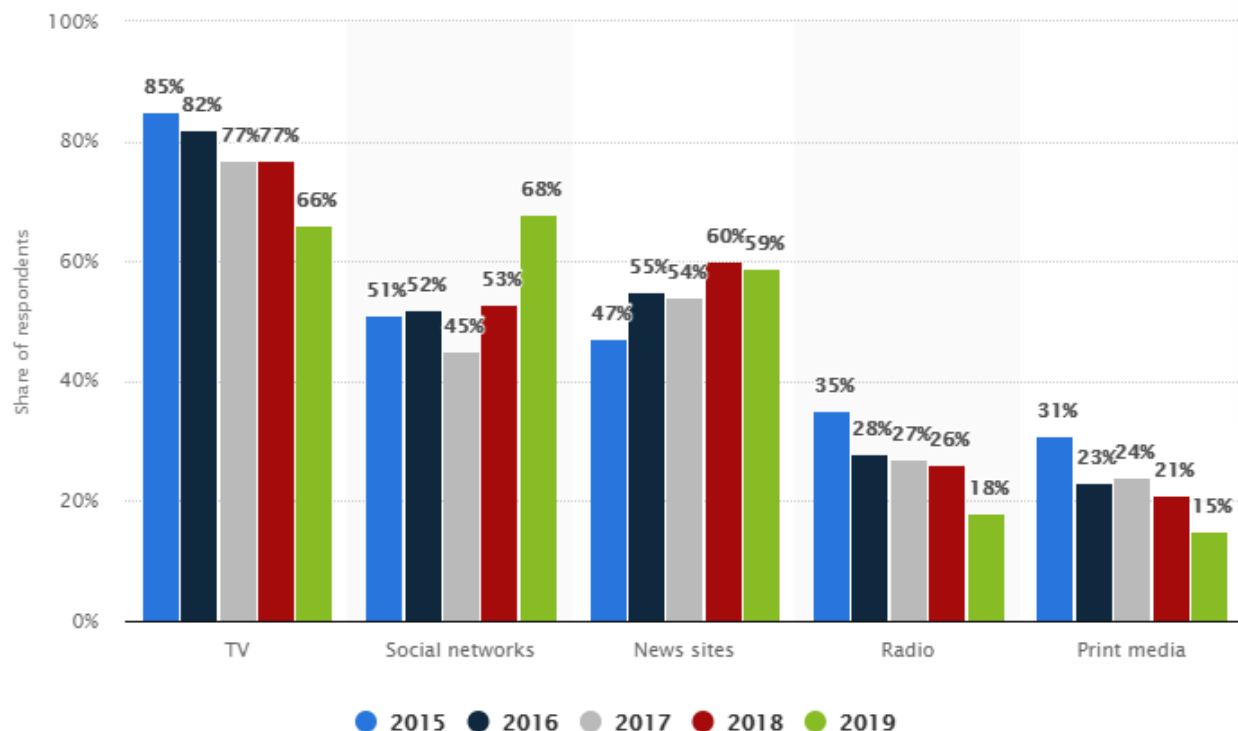
Source: [Sojern](#)

# Media Consumption Overview



MOST OF THE COUNTRY'S OUTLETS ARE PRIVATELY OWNED

## Types of media used for news



TV dominates the media landscape



Websites and social media platforms are the second most popular media



Print sector is small and less consumed



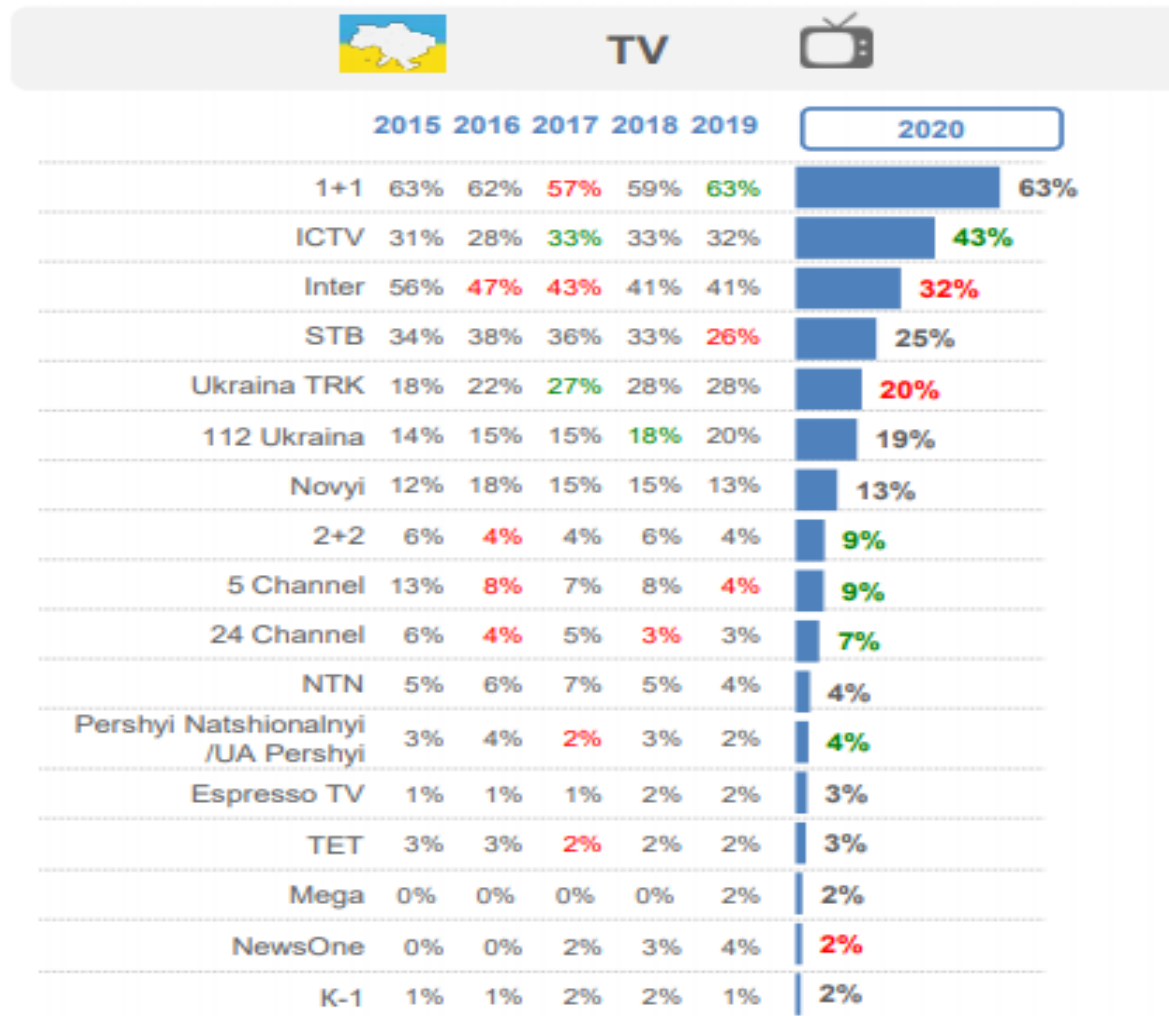
Radio somewhat maintains its position

# Television



TV IS THE MOST DEMANDED MEDIUM

## Top TV channels and their preference



The top watched channels are infotainment producing a wide range of programs for families of all ages

National TV channels are most popular among the residents of central Ukraine. Regional TV channels are most popular in western Ukraine

77 percent of Ukrainians watch television at least once per month

# Radio



26% OF UKRAINIANS LISTEN TO THE RADIO AT LEAST ONCE PER MONTH

## The most popular radio stations in Armenia



Lux FM (Люкс FM)



Hit Fm (Xit FM)



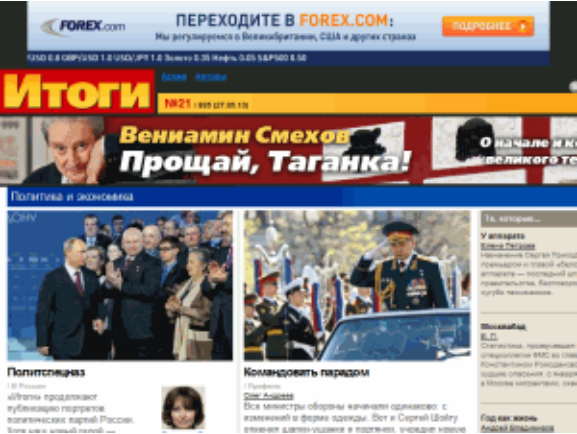
Relax Radio (Радио Релакс)



Radio Shanson (радио Шансон)

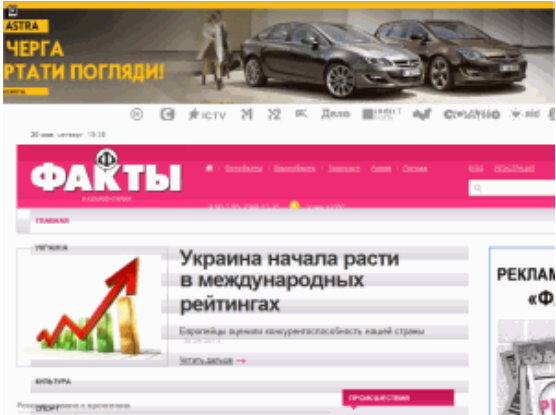


TOP NEWSPAPER BRANDS



Segodnya

Mass-circulation daily newspaper in Russian



Fakty i Kommentarii

Mass-circulation tabloid daily newspaper in Russian



Kyiv Post

English-language weekly newspaper



Zerkalo Nedeli

Political weekly newspaper

# Out of home



Yadro Agency - an advertising holding company from Kiev covering areas around International Airport and Kharkiv Metro in Kyiv



BigMedia has one of the widest network of advertising spaces with over 10 000 units. It covers 27 cities and major motorways in Ukraine.



# Digital



## DIGITAL MEDIA ON THE RISE



# Digital



THEY SPEND THE LONGEST TIMES ON YOUTUBE

JAN  
2021

## TOP WEBSITES BY TRAFFIC (ALEXA)

RANKING OF TOP WEBSITES BASED ON TOTAL TRAFFIC VOLUME IN DECEMBER 2020, ACCORDING TO ALEXA\*



UKRAINE

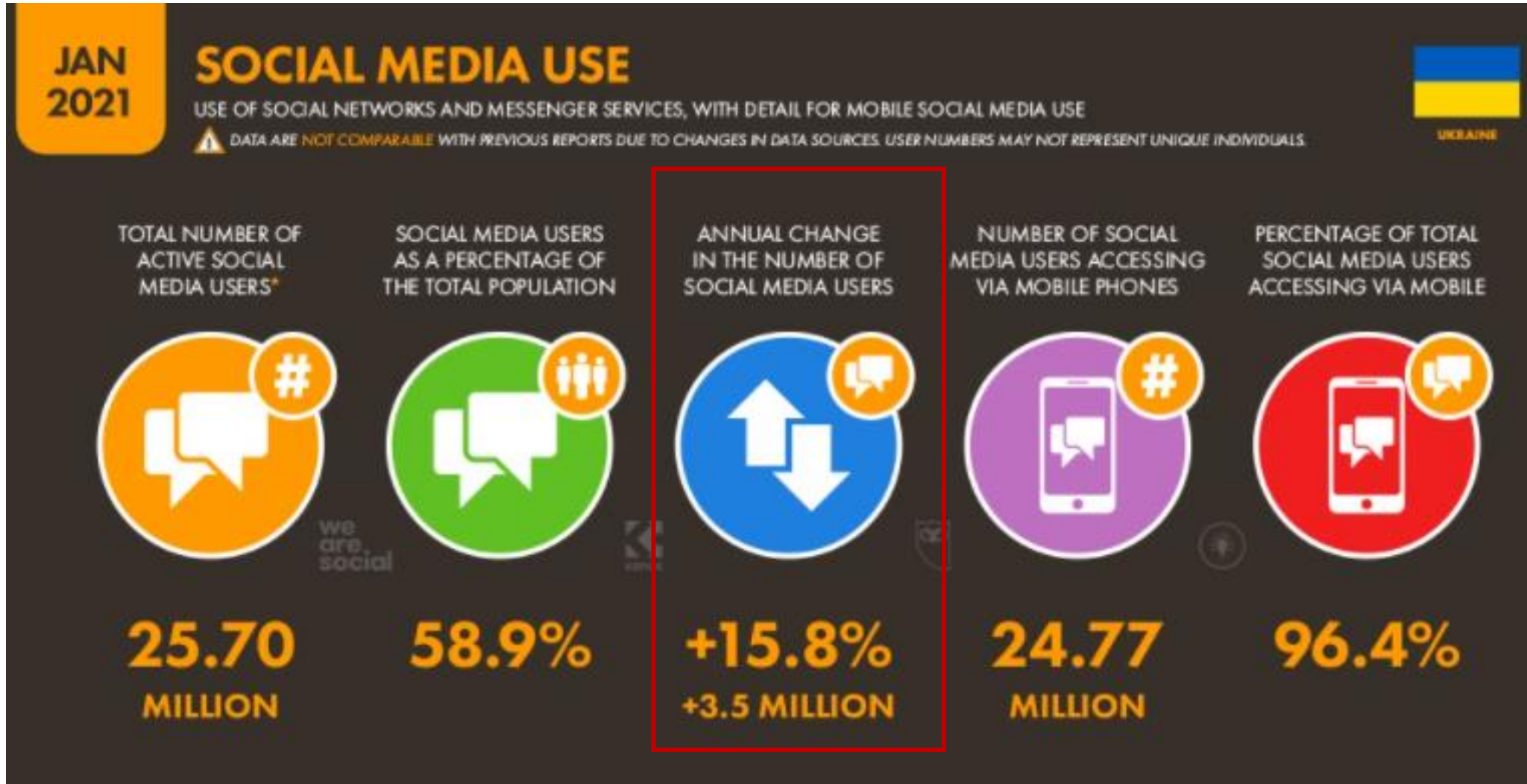
#	WEBSITE	TIME / DAY	PAGES / DAY
01	GOOGLE.COM	15M 41S	1702
02	YOUTUBE.COM	17M 23S	9.86
03	GOOGLE.COM.UA	4M 37S	4.59
04	BONGACAMS.COM	2M 46S	1.59
05	OLX.UA	13M 44S	9.58
06	WIKIPEDIA.ORG	3M 48S	3.10
07	ROZETKA.COM.UA	4M 50S	3.70
08	UKR.NET	3M 47S	2.06
09	VK.COM	7M 21S	3.77
10	PRIVATBANK.UA	5M 03S	2.53

#	WEBSITE	TIME / DAY	PAGES / DAY
11	PROM.UA	6M 43S	3.71
12	PRIVAT24.UA	3M 01S	1.63
13	REZKA.AG	2M 33S	3.17
14	RIA.COM	17M 08S	7.88
15	FILMIX.CO	1M 53S	2.71
16	GISMETEO.UA	2M 31S	2.36
17	SINOPTIK.UA	2M 03S	1.62
18	OK.RU	4M 11S	2.36
19	IVI.RU	2M 53S	2.64
20	I.UA	6M 57S	4.37



# Digital

2021 SAW A 15.8% INCREASE IN SOCIAL MEDIA USERS



# Upcoming Opportunities



## LIST OF PUBLIC HOLIDAYS

New Year's Day Holidays: 1st January

Christmas Holiday: 7th January

Women's Day: 8th March

Labor Day: 1<sup>st</sup> May

Orthodox Easter: 2<sup>nd</sup> May – 3<sup>rd</sup> May

Victory Day / Memorial Day: 9<sup>th</sup> May & 10<sup>th</sup> May

Orthodox Pentecost: 20<sup>th</sup> June & 21<sup>st</sup> June

Constitution Day: 28th June

Independence Day: 24th August

Defenders' Day: 24th October

Catholic Christmas Day: 25<sup>th</sup> December





# APPENDIX

## MEDIA TITLES



## KEY MEDIA

### YANDEX

**Total visits :** 3.4 billion

**Pages per visit:** 9.63

**Avg .visit duration:** 11:54 mins

Yandex is a technology company that builds intelligent products and services powered by machine learning. They help consumers and businesses better navigate the online and offline world. They have developed market-leading on-demand transportation services, navigation products, and other mobile applications for millions of consumers across the globe. Yandex, which has 30 offices worldwide, has been listed on the NASDAQ since 2011.

### AVIASALES.RU

**Total visits :** 8.45 million

**Pages per visit:** 4.27

**Avg .visit duration:** 5:57 mins

Aviasales is an airline ticket metasearch that has existed since 2007. The monthly audience of the service is estimated at about 15 million people. The headquarters of the company is located in Thailand. Aviasales has two more offices in Russia: in Moscow

### MAIL.RU

**Total visits :** 977.8 million

**Pages per visit:** 6.88

**Avg .visit duration:** 8:28 mins

Mail.ru Group, OOO is a Russian internet company. It was started in 1998 as an e-mail service and went on to become a major corporate figure in the Russian-speaking segment of the Internet.

The Yandex logo, featuring the word "Yandex" in a bold, sans-serif font. The "Y" is red, and the "andex" is black.The Mail.ru group logo, featuring the text "@mail.ru" in a bold, sans-serif font with a blue outline, and the word "group" in a smaller, lowercase, sans-serif font below it.

## KEY MEDIA

### VK

**Total visits :** 3.4 billion

**Pages per visit:** 9.63

**Avg .visit duration:** 11:54 mins

**VK** short for its original name **Vkontakte**, is a Russian online social media and social networking service based in Saint Petersburg. VK is available in multiple languages but it is predominantly used by Russian-speakers. VK allows users to message each other publicly or privately, create groups, public pages, and events, share and tag images, audio, and video, and play browser-based games.



### OSTROVOK.RU

**Total visits :** 1.43 million

**Pages per visit:** 12.89

**Avg .visit duration:** 4:56 mins

Ostrovok.ru is a Russian online hotel booking service, founded in 2010 by Serge Faguet and Kirill Makharinsky. It has over one million accommodation options

OSTROVOK.RU

### OK

**Total visits :** 661.5 million

**Pages per visit:** 11.99

**Avg .visit duration:** 11:21 mins

Odnoklassniki (English: Classmates) is a social network service used mainly in Russia and former Soviet Republics.[1] The site was developed by Albert Popkov and launched on March 4, 2006.

